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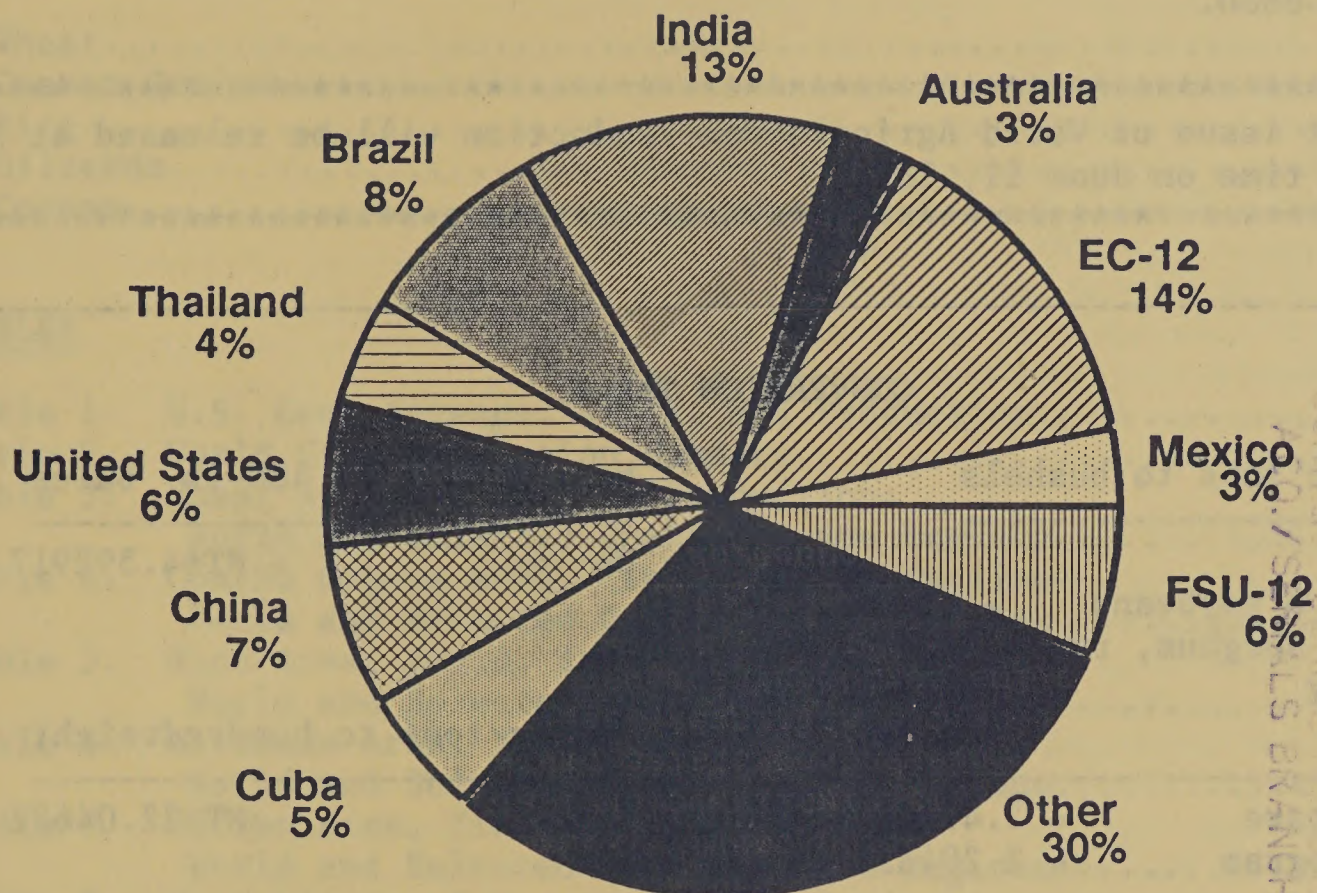
Foreign
Agricultural
Service

Circular Series
WAP 5-92
May 1992

World Agricultural Production

World Centrifugal Sugar Production

Top Producers



JUN 12 1992

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Production Articles This Month...

World Sugar
World Flaxseed
World Cotton
Bulgarian Grains
Mexican Tomatoes
Former USSR Grains
Dairy in Selected Countries
Dried Fruit in Selected Countries
Pineapple in Selected Countries

This report draws on information from USDA's global network of agricultural attaches and counselors, official statistics of foreign governments, other foreign source materials, and results of office analysis. Estimates of U.S. acreage, yield, and production are from USDA's Agricultural Statistics Board, except where noted. Text and numbers in this report are based on unrounded data and detail may not add to totals because of rounding. This report reflects official USDA estimates released in World Agricultural Supply and Demand Estimates (WASDE-266), May 11, 1992.

This report was prepared by the Production Estimates and Crop Assessment Division (PECAD), FAS/USDA, Washington, D.C. 20250. Further information may be obtained by writing to the division or by calling (202) 720-0888 or by FAX (202) 720-8880.

 * The next issue of World Agricultural Production will be released at 3 p.m. *
 * Eastern time on June 11, 1992. *

:			:
:	CONVERSION TABLE		:
:			:
:	Metric tons to bushels		:
:	-----		:
:		:	:
:	Wheat & soybeans	= MT*36.7437	:
:	Corn, sorghum, rye	= MT*39.36825	:
:	Barley	= MT*45.929625	:
:	Oats	= MT*68.894438	:
:	-----		:
:	1 hectare	= 2.471044 acres	:
:	1 kilogram	= 2.204622 pounds	:

NOTE: FSU-12 includes the 12 Newly Independent States of the Former Soviet Union. Grain production is now estimated on a clean-weight basis instead of bunker-weight and no longer includes minor grains and pulses. Estimates for the Baltic States are now included in the "Others" category of the tables.

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PRODUCTION HIGHLIGHTS FOR 1992/93

May 1992

WHEAT: World production for 1992/93 is projected at 548.6 million tons, up 7.0 million or 1 percent from the 1991/92 harvest. Total foreign production is projected at 486.9 million tons, down 0.8 million or marginally lower from 1991/92. Country highlights are as follows:

- o United States Production is projected at 61.7 million tons, up 7.8 million or 15 percent from 1991/92.
- o FSU-12 Production is projected at 83.7 million tons, up 11.4 million or 16 percent from 1991/92. Expanded plantings, lower-than-average winterkill, and favorable weather account for the increase in estimated output.
- o Eastern Europe Production is projected at 31.1 million tons, down 7.2 million or 19 percent from 1991/92. The decline is primarily the result of significant area reductions in Hungary, Romania, Bulgaria, and Yugoslavia.
- o EC-12 Production is projected at 89.0 million tons, down 0.9 million or 1 percent from 1991/92. Lower estimates for Spain, Portugal, Italy, and Greece more than offset increases in Germany and France.
- o India Production is projected at 54.0 million tons, down 0.5 million or 1 percent from 1991/92. Area is estimated lower due to high relative oilseed prices favoring winter rapeseed. Yield is estimated to surpass the previous record set last season. Most northern states benefited from ideal winter weather.
- o Turkey Production is projected at 16.0 million tons, down 0.5 million or 3 percent from 1991/92. Although estimated area is slightly higher, yield is forecast lower than the 1991 record level.
- o Canada Production is projected at 30.0 million tons, down 2.8 million or 9 percent from 1991/92. Although Statistics Canada reported a record sown area for the 1992/93 season, yields are not expected to match the high levels of the last two years.
- o China Production is projected at 94.0 million tons, down 2.0 million or 2 percent from 1991/92. Dry weather at planting and spring drought in the Northern Plains are expected to reduce winter wheat harvested area and yield.

- o Pakistan Production is projected at 14.5 million tons, down 0.1 million or less than 1 percent from 1991/92. Area is estimated lower due to dry planting conditions and a late autumn cotton harvest.
- o Australia Production is projected at 15.5 million tons, up 5.5 million or 55 percent from 1991/92. Both area and yield are estimated to be higher than the 1991/92 drought-reduced levels.
- o Argentina Production is projected at 10.0 million tons, up 1.0 million or 11 percent from 1991/92. After 1991's lowest area in 10 years, harvested area is expected to increase by 22 percent due to better wheat price prospects.
- o Brazil Production is projected at 3.5 million tons, up 0.5 million or 17 percent from 1991/92. Area planted is forecast to make a modest recovery over last year's level, which was the lowest in nearly 10 years.

COARSE GRAINS: World production for 1992/93 is projected at 834.0 million tons, up 35.3 million or 4 percent from the 1991/92 harvest. Total foreign production is projected at 585.0 million tons, up 4.8 million or 1 percent from 1991/92. Country highlights are as follows:

- o United States Production is projected at 249.0 million tons, up 30.5 million or 14 percent from 1991/92.
- o FSU-12 Production is projected at 87.5 million tons, up 14.6 million or 20 percent from 1991/92. A slightly higher area estimate and a rebound in yields are expected to boost production over the 1991 level.
- o Eastern Europe Production is projected at 55.7 million tons, down 8.8 million or 14 percent from 1991/92. A significant decline in barley area is expected in Romania, Bulgaria, and Yugoslavia. Corn area, however, is projected to increase slightly in these same countries. Coarse grain yields are expected to decline due to lower input use and dry conditions for winter barley.
- o China Production is projected at 107.7 million tons, down 2.5 million or 2 percent from 1991/92. Corn production is projected to drop 3 percent to 92.0 million tons due to a small decline in area and yield. Barley and sorghum production are estimated to increase slightly.

o EC-12

Production is projected at 87.1 million tons, down 2.2 million or 3 percent from 1991/92. A decrease in corn output from France and Spain more than offset increases in Germany and Italy. Barley production is projected to be lower in Spain, the United Kingdom, and Greece, but higher in Germany and France.

o Canada

Production is projected at 22.3 million tons, down 0.4 million or 2 percent from 1991/92. Lower harvested area is expected for barley, corn, and rye, while oats area is expected to increase.

o Turkey

Production is projected at 9.4 million tons, down 0.2 million or 2 percent from 1991/92. A decrease in estimated barley output is expected to more than offset higher expected corn production.

o Brazil

Production is projected at 29.3 million tons, virtually unchanged from 1991/92. A decrease in estimated sorghum production is expected to be offset by an increase in barley output. Corn production is projected unchanged from the 1991/92 level.

o South Africa

Production is projected at 8.5 million tons, up 5.6 million or 193 percent from 1991/92. Corn output, projected at 8.0 million tons, is expected to rebound from the drought-reduced 1991/92 crop. A slight increase in area and yield is expected for corn.

o India

Production is projected at 33.0 million tons, up 1.5 million or 5 percent from 1991/92. Both corn and millet yields are expected to improve from last year's drought-reduced levels.

RICE (MILLED-BASIS): World production for 1992/93 is projected at 352.3 million tons, up 3.9 million or 1 percent from the 1991/92 crop. Total foreign production is projected at 347.0 million tons, up 3.6 million or 1 percent from 1991/92. U.S. output is projected at 5.3 million tons, up 0.2 million or 5 percent from last season.

OILSEEDS: World oilseed production for 1992/93 is forecast at 223.0 million tons, down 0.9 million or less than 1 percent from 1991/92. Total foreign production is forecast at a record 161.4 million tons, up 2.0 million or 2 percent from last year. U.S. oilseed production is forecast at 61.6 million tons, down 2.8 million or 4 percent from 1991/92.

COTTON: World production for 1992/93 is projected at 94.0 million bales, down 1.2 million or 1 percent from 1991/92. Total foreign production is forecast at 76.8 million bales, 0.8 million below the 1991/92 record. U.S. production is forecast at 17.2 million bales, down 2 percent from 1991/92.

PRODUCTION HIGHLIGHTS FOR 1991/92

WHEAT: World production for 1991/92 is estimated at 541.6 million tons, down 5.2 million or 1 percent below last month's estimate. Most of the decline is attributed to the new method of calculating the estimates for the Newly Independent States of the former USSR (see note at the bottom of page 2). Other downward revisions include the EC-12 and East Europe, while Turkey is revised upward.

COARSE GRAINS: World production for 1991/92 is estimated at 798.7 million tons, down 2.7 million or marginally below last month's estimate. A reduced estimate for the Newly Independent States of the Former USSR, resulting from the change in calculating the estimates (see note at bottom of page 2), more than offset higher estimates for Argentina, Eastern Europe, South Africa, and EC-12.

RICE (MILLED-BASIS): World production for 1991/92 is projected at 348.4 million tons, up 0.3 million or marginally above last month's estimate. Upward revisions are made for Argentina, Iran, and Cambodia, but estimates for Thailand, Cuba, Nigeria, and Laos are lower.

OILSEEDS: Total world oilseeds production during 1991/92 is forecast at a record 223.9 million tons, down 0.3 million or less than 1 percent from last month, but up 3 percent from 1990/91. Foreign production during 1991/92 is forecast to be a record 159.4 million tons, down 0.4 million or less than 1 percent from last month, but up 1 percent from 1990. Total oilseed production in the United States is forecast at 64.4 million tons, up 0.2 million or less than 1 percent from last month and up 6 percent from a season earlier.

* **Soybeans:** World production for 1991/92 is estimated at 105.4 million tons, up marginally from last month and up 1 percent from 1990. Total foreign soybean output is estimated at 51.4 million tons, up marginally from last month, but down slightly from 1990/91. Country highlights are as follows:

o **United States** Production is estimated at 54.0 million tons, unchanged from last month, but up 3 percent from 1990. The National Agricultural Statistics Service, USDA, estimates yield at 2.3 tons per hectare from a harvested area of 23.5 million hectares.

* **Cottonseed:** World production for 1991/92 is forecast at 36.6 million tons, up marginally from last month and up 9 percent from 1990. Total foreign production is forecast at 30.3 million tons, down 0.2 million or 1 percent from last month, but up 8 percent from 1990/91. Country highlights are as follows:

o **United States** Production is estimated at 6.3 million tons, up 0.2 million or 2 percent from last month and up 16 percent from 1990/91. Official estimates by the National Agricultural Statistics Service increased harvested area by 48,000 hectares or 1 percent and raised average yield from 1.18 tons per hectare to 1.20 tons per hectare.

- o Fmr. USSR Production is estimated at 4.4 million tons, down 0.1 million or 2 percent from last month and down 11 percent from 1990/91. Both area and yield were reduced to reflect a downward adjustment in the cotton lint estimate.

- * Peanuts: World production for 1991/92 is forecast at 22.6 million tons, down 0.1 million or less than 1 percent from last month, but up 1 percent from 1990/91. Total foreign production is forecast at 20.4 million tons, down 0.1 million or less than 1 percent from last month and down 1 percent from last season. Country highlights are as follows:
 - o United States Production is estimated at a record 2.2 million tons, unchanged from last month, but up 37 percent from 1990/91. The National Agricultural Statistics Service estimates yield at 2.74 tons per hectare from a record harvested area of 0.8 million hectares.

- * Sunflowerseed: World production for 1991/92 is estimated at 20.6 million tons, down 0.2 million or 1 percent from last month and down 9 percent from 1990/91. Total foreign production is estimated at 18.9 million tons, down 0.2 million or 1 percent from last month and down 12 percent from a season earlier. Country highlights are as follows:
 - o United States Production is estimated at 1.6 million tons, unchanged from last month, but up 59 percent from 1990/91. NASS estimates yield at 1.51 tons per hectare from a harvested area of 1.081 million hectares.
 - o Argentina Production is estimated at 3.3 million tons, down 0.2 million or 6 percent from last month and down 15 percent from 1990/91. Yield is expected to be down due to heavy rains at the pollination stage.

- * Rapeseed: World production for 1991/92 is estimated at a record 28.7 million tons, up slightly from last month and up 14 percent from 1990/91. Total foreign production is estimated at 28.6 million tons, up slightly from last month and up 14 percent from 1990. Country highlights are as follows:
 - o United States Production is estimated at 83,000 tons, unchanged from last month, but up 53 percent from 1990/91. NASS estimates yield at 1.4 tons per hectare from a harvested area of 58,000 hectares.

- * Flaxseed: World production for 1991/92 is estimated at 2.1 million tons, down marginally from last month and down 8 percent from 1990/91. The production estimate for United States for the 1991/92 was unchanged this month at an estimated 155,000 tons, up 60 percent from 1990. Total foreign production is pegged at 1.9 million tons, down marginally from last month and down 11 percent from 1990/91. There were no significant country changes this month.

- * Copra: World production for 1991/92 is forecast at 4.4 million tons, down 0.1 million or 3 percent from last month and down 7 percent from 1990/91. Country highlights are as follows:

- o Philippines Copra production is estimated at 1.8 million tons, down 76,000 or 4 percent from last month and down 12 percent from 1990/91. Copra collection was adversely affected by dry conditions, particularly on the island of Mindanao which accounts for more than 50 percent of copra output.

- * Palm Kernels: World production for 1991/92 is forecast at a record 3.5 million tons, down marginally from last month, but up 5 percent from a season earlier. There were no significant country changes this month.

- * Palm Oil: World production for 1991/92 is forecast at a record 11.7 million tons, down marginally from last month, but up 4 percent from 1990/91. There were no significant country changes this month.

COTTON: World cotton production for 1991/92 is projected at a record 95.2 million bales. This estimate is down 0.2 million bales or less than 1 percent from last month, but up 9 percent from 1990/91. Total foreign production is projected at a record 77.6 million bales, down 0.3 million or less than 1 percent from last month, but is an increase of 8 percent over 1990/91. Country highlights are as follows:

- o United States Production is estimated at 17.6 million bales, up 0.1 million or less than 1 percent from last month and up 14 percent from 1990/91. Area estimates were raised, offsetting lower estimated yield.
- o Fmr. USSR Production is estimated at 11.0 million bales, down 0.3 million or 2 percent from last month and down 7 percent from 1990. Area and yield estimates were lowered.
- o Australia Production is estimated at 1.8 million bales, up 0.1 million or 6 percent from last month, but down 12 percent from 1990/91. Yield estimates were increased due to excellent harvest conditions.

TABLE 1

U.S. Crop Acreage, Yield, and Production 1/

COMMODITY	PLANTED AREA			HARVESTED AREA			YIELD			PRODUCTION		
	1990/91	Prel. 1991/92	Proj. 1992/93	1990/91	Prel. 1991/92	Proj. 1992/93	1990/91	Prel. 1991/92	1992/93 Proj. May	1990/91	Prel. 1991/92	1992/93 Proj. May
All Wheat Winter Other Rye	--Million acres--			--Million acres--			--Bushels per acre--			--Million bushels--		
	77.2	69.9		69.3	57.7		39.5	34.3		2,736	1,981	2,268
	56.9	51.0	50.2	49.9	39.4	43.3	40.7	34.8	37.3	2,031	1,372	1,618
	20.3	18.9		19.4	18.3		36.4	33.3		706	609	650
	1.6	1.7		0.4	0.4		27.1	24.6		10	10	10
Soybeans	57.8	59.1		56.5	58.0		34.0	34.3		1,926	1,986	1,915
Corn Sorghum Barley Oats	74.2	76.0		67.0	68.8		118.5	108.6		7,934	7,474	8,575
	10.5	11.0		9.1	9.8		63.1	59.0		573	579	700
	8.2	8.9		7.5	8.4		56.1	55.2		422	464	420
	10.4	8.7		5.9	4.8		60.1	50.6		358	243	275
Rice							--Pounds per acre--			--Million CWT--		
	2.9	2.9		2.8	2.8		5,529	5,617		156.1	154.5	166.0
All Cotton										--Million 480-pound bales--		
	12.4	14.1		11.7	13.0		614	652		15.5	17.6	17.2

1/ Estimates from National Agricultural Statistics Service (NASS) for 1990/91, 1991/92 and winter wheat forecast for 1992/93. All other 1992/93 projections are from USDA Interagency Commodity Estimates Committees.

May 1992

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 2

World Crop Production Summary

Commodity	World	Total Foreign	North America			Europe			Fmr. USSR 3/	Asia					South America		Selected Other			All Other Countries
			United States	Canada	Mexico	EC-12	Oth. W. Europe	Eastern Europe		China	India	Indo-nesia	Paki- stan	Thai- land	Argen- tina	Brazil	Aus- tralia	South Africa		
—Million metric tons—																				
Wheat 1990/91 1991/92 prel. 1992/93 proj. May	588.8 541.6	514.3 487.7	74.5 53.9	32.7 32.8	3.9 3.7	84.7 90.0	5.1 4.1	40.8 38.3	100.3 72.3	98.2 96.0	49.9 54.5	0.0 0.0	14.4 14.6	0.0 0.0	10.9 9.0	3.1 3.0	15.1 10.0	1.7 2.2	16.0 16.5	18.5 18.0
	548.6	486.9	61.7	30.0	3.5	89.0	3.9	31.1	83.7	94.0	54.0	0.0	14.5	0.0	10.0	3.5	15.5	1.5	16.0	17.7
	822.2 798.7	591.5 580.3	230.7 218.5	25.4 22.7	18.4 17.2	84.3 89.4	13.7 12.3	50.8 64.5	99.4 72.9	113.5 110.3	32.9 31.5	5.2 5.3	2.8 2.4	4.1 3.8	10.8 14.1	24.4 29.3	6.7 6.9	8.9 2.9	9.3 9.6	81.0 85.2
	834.0	585.0	249.0	22.3	16.8	87.1	11.6	55.7	87.5	107.7	33.0	5.3	2.2	4.0	13.0	29.3	6.9	8.5	9.4	84.6
Rice (Milled) 1990/91 1991/92 prel. 1992/93 proj. May	352.3 348.4	347.2 343.4	5.1 5.0	0.0 0.0	0.2 0.2	1.6 1.4	0.0 0.0	0.1 0.1	1.4 1.3	132.5 130.2	74.6 71.0	29.4 28.7	3.3 3.2	11.3 13.4	0.3 0.4	6.5 7.3	0.5 0.7	0.0 0.0	0.2 0.1	24.0 24.2
	352.3	347.0	5.3																	
	1,763.3 1,688.8	1,453.0 1,411.4	310.3 277.4	58.1 55.5	22.5 21.1	170.6 180.8	18.7 16.3	91.7 102.9	201.1 146.5	344.2 336.5	157.3 157.1	34.6 34.0	20.5 20.1	15.4 17.2	22.0 23.5	33.9 39.6	22.2 17.6	10.6 5.2	25.5 26.2	204.0 211.4
Oilseeds 2/ 1989/90 1990/91 prel. 1991/92 proj. April May	1,734.9	1,418.9	316.0																	
	214.3 217.8	155.0 157.2	59.3 60.6	4.9 5.6	1.4 1.0	11.5 13.1	0.7 0.7	5.2 4.3	13.8 13.0	28.5 33.3	19.4 20.3	2.2 2.2	3.3 3.7	0.9 0.8	15.8 16.8	21.6 17.1	0.7 1.9	1.0 0.9	2.3 2.0	21.8 20.4
	224.1 223.9	159.9 159.4	64.3 64.4	6.5 6.5	1.1 1.2	13.7 13.7	0.7 0.7	4.1 4.2	11.7 11.6	34.0 34.0	21.0 21.0	2.2 2.2	4.7 4.7	0.7 0.7	15.0 14.8	20.1 20.1	1.0 1.0	0.4 0.4	1.7 1.7	21.2 21.0
	—Million 480-pound bales—																			
Cotton 1989/90 1990/91 prel. 1991/92 proj. April May	79.9 87.0	67.7 71.5	12.2 15.5	0.0 0.0	0.8 0.8	1.5 1.3	0.0 0.0	0.1 0.1	12.2 11.9	17.4 20.7	10.6 9.1	0.0 0.0	6.7 7.5	0.1 0.1	1.3 1.4	3.0 3.2	1.4 2.0	0.3 0.2	2.8 3.0	9.5 10.1
	95.4 95.2	77.8 77.6	17.5 17.6	0.0 0.0	0.8 0.8	1.3 1.3	0.0 0.0	0.1 0.1	11.3 11.0	26.0 26.0	9.1 9.1	0.0 0.0	10.0 10.0	0.2 0.2	1.2 1.2	3.6 3.6	1.7 1.8	0.2 0.1	2.6 2.6	9.8 9.8

1/ Includes total of wheat, coarse grains, and rice (milled) shown above.

2/ Totals for major regions and countries include the six major oilseeds shown elsewhere in this report, while world and total foreign also includes copra and palm kernels for all countries.

3/ Fmr. USSR covers the same area previously designated USSR for oilseeds and cotton. Wheat, coarse grains, and rice estimates represent FSU-12 only. See note at the bottom of page 2 referencing FSU-12.

Note: Entries of 0.0 indicate no reported or insignificant production.

May 1992

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 3

Wheat Area, Yield, and Production World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD			PRODUCTION		
	Prel. 1990/91	Proj. 1991/92	1992/93	Prel. 1990/91	1992/93 1991/92	Proj. May	Prel. 1990/91	1992/93 1991/92	Proj. May
	---Million hectares---			---Metric tons per hectare---			---Million metric tons---		
World	231.8	222.1		2.54	2.44		588.8	541.6	548.6
United States	28.0	23.3		2.66	2.31		74.5	53.9	61.7
Total Foreign	203.7	198.7	199.4	2.52	2.45	2.44	514.3	487.7	486.9
Maj. Foreign Exporters	45.8	43.6	47.1	3.13	3.25	3.07	143.4	141.8	144.5
Argentina	5.7	4.5	5.5	1.91	2.00	1.82	10.9	9.0	10.0
Australia	9.2	7.8	10.2	1.63	1.28	1.52	15.1	10.0	15.5
Canada	14.4	14.5	14.8	2.27	2.26	2.03	32.7	32.8	30.0
EC-12	16.5	16.8	16.7	5.14	5.35	5.35	84.7	90.0	89.0
Major Importers	97.9	94.9	93.2	2.59	2.36	2.39	253.3	223.5	222.8
Brazil	3.3	2.1	2.3	0.94	1.43	1.52	3.1	3.0	3.5
China	30.8	30.8	30.5	3.19	3.12	3.08	98.2	96.0	94.0
Eastern Europe	9.7	9.8	8.4	4.19	3.89	3.72	40.8	38.3	31.1
Egypt	0.7	0.8	0.8	5.79	5.90	5.90	4.3	4.5	4.6
Other N. Africa 1/	5.4	5.6	5.2	1.04	1.55	0.97	5.7	8.6	5.1
Japan	0.3	0.2	0.2	3.66	3.18	3.58	1.0	0.8	0.9
FSU-12 2/	47.7	45.6	45.8	2.10	1.59	1.83	100.3	72.3	83.7
Other Foreign	60.0	60.2	59.2	1.96	2.03	2.02	117.6	122.5	119.6
India	23.5	24.0	23.4	2.12	2.27	2.31	49.9	54.5	54.0
Iran	6.5	6.7	6.8	1.26	1.34	1.25	8.2	8.9	8.5
Mexico	1.0	0.9	0.9	4.11	4.20	4.12	3.9	3.7	3.5
Non-EC W. Europe	0.9	0.8	0.8	5.41	5.14	5.20	5.1	4.1	3.9
Pakistan	7.8	7.9	7.8	1.84	1.84	1.86	14.4	14.6	14.5
South Africa	1.6	1.4	1.1	1.10	1.58	1.36	1.7	2.2	1.5
Turkey	8.8	8.8	8.8	1.83	1.87	1.82	16.0	16.5	16.0
Others	10.0	9.8	9.7	1.85	1.84	1.83	18.5	18.0	17.7

1/ Algeria, Libya, Morocco, and Tunisia.

2/ See note at the bottom of page 2 referencing the FSU-12. Production for the Baltic States in 1990/91, 1991/92, and 1992/93 is estimated at 1.6, 0.9, and 1.3 million metric tons, respectively.

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 4
Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD			PRODUCTION		
	Prel. 1990/91	Proj. 1991/92	1992/93	Prel. 1990/91	1992/93 Proj. 1991/92 May		Prel. 1990/91	1992/93 Proj. 1991/92 May	
<u>TOTAL COARSE GRAINS</u>	---Million hectares---			---Metric tons per hectare---			---Million metric tons---		
World 1/	316.1	323.4		2.60	2.47		822.2	798.7	834.0
United States	36.4	37.3		6.34	5.85		230.7	218.5	249.0
Total Foreign	279.7	286.0	283.9	2.11	2.03	2.06	591.5	580.3	585.0
Maj. Foreign Exporters	20.2	21.1	21.2	2.76	2.39	2.58	55.8	50.4	54.7
Argentina	3.2	3.8	4.2	3.33	3.71	3.08	10.8	14.1	13.0
Australia	4.1	4.9	4.5	1.64	1.40	1.53	6.7	6.9	6.9
Canada	7.6	6.9	7.0	3.32	3.29	3.20	25.4	22.7	22.3
South Africa	3.7	3.9	4.0	2.40	0.74	2.13	8.9	2.9	8.5
Thailand	1.5	1.5	1.5	2.64	2.54	2.65	4.1	3.8	4.0
Major Importers	98.5	99.8	99.7	2.72	2.58	2.61	268.1	257.7	260.1
Eastern Europe	15.9	16.6	16.2	3.19	3.88	3.44	50.8	64.5	55.7
EC-12	19.4	19.0	18.5	4.36	4.70	4.71	84.3	89.4	87.1
Other W. Europe	3.0	2.9	2.8	4.49	4.29	4.15	13.7	12.3	11.6
Mexico	8.2	8.8	9.1	2.23	1.95	1.84	18.4	17.2	16.8
FSU-12 2/	51.6	52.1	52.8	1.93	1.40	1.66	99.4	72.9	87.5
Other Major Import. 3/	0.4	0.4	0.4	3.84	3.77	3.87	1.5	1.4	1.4
Other Foreign	161.0	165.2	162.9	1.66	1.65	1.66	267.6	272.2	270.2
Brazil	13.4	14.1	14.1	1.82	2.08	2.08	24.4	29.3	29.3
China	29.1	29.0	28.8	3.90	3.80	3.74	113.4	110.3	107.7
India	36.6	36.7	36.6	0.90	0.86	0.90	32.9	31.5	33.0
Indonesia	2.9	2.9	2.9	1.82	1.83	1.83	5.2	5.3	5.3
Nigeria	9.5	9.5	9.5	0.67	0.85	0.86	6.3	8.1	8.2
Philippines	3.9	3.6	3.9	1.32	1.28	1.26	5.1	4.6	4.9
Turkey	4.4	4.4	4.5	2.10	2.17	2.12	9.3	9.6	9.4
Others	61.3	64.9	62.7	1.16	1.13	1.15	70.9	73.6	72.3
<u>BARLEY</u>									
World	74.1	78.4		2.41	2.16		178.9	169.0	166.9
United States	3.0	3.4		3.02	2.97		9.2	10.1	9.1
Total Foreign	71.1	75.0	71.0	2.39	2.12	2.22	169.7	158.9	157.8
Australia	2.5	2.8	2.7	1.62	1.43	1.48	4.1	4.0	4.0
Canada	4.7	4.5	4.4	2.96	2.78	2.73	13.9	12.5	12.0
China	3.3	3.3	3.3	1.73	1.73	1.78	5.7	5.7	5.8
Eastern Europe	3.6	4.0	3.8	3.99	3.69	3.57	14.3	14.8	13.4
EC-12	12.3	12.0	11.7	4.12	4.26	4.31	50.8	51.3	50.5
Other W. Europe	1.5	1.5	1.5	4.37	4.06	3.97	6.4	6.3	6.0
Turkey	3.4	3.4	3.4	1.94	2.00	1.91	6.6	6.8	6.5
FSU-12 2/	25.2	27.5	25.8	1.98	1.32	1.62	50.0	36.3	41.9
Others	14.6	16.0	14.4	1.23	1.33	1.22	17.9	21.2	17.5

FOOTNOTES AT END OF TABLE.

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Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 4
Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD			PRODUCTION		
	1990/91	Prel. 1991/92	Proj. 1992/93	1990/91	Prel. 1991/92	1992/93 Proj. May	1990/91	Prel. 1991/92	1992/93 Proj. May
<u>CORN</u>	---Million hectares---			---Metric tons per hectare---			---Million metric tons---		
World	127.1	130.6		3.76	3.67		477.6	479.7	509.2
United States	27.1	27.9		7.44	6.82		201.5	189.9	217.8
Total Foreign	100.0	102.7	104.3	2.76	2.82	2.79	276.1	289.9	291.3
Maj. Foreign Exporters	6.3	7.0	7.4	3.11	2.40	2.88	19.7	16.7	21.2
Argentina	2.0	2.4	2.7	3.90	4.38	3.52	7.6	10.5	9.5
South Africa	3.0	3.3	3.4	2.74	0.80	2.39	8.3	2.6	8.0
Thailand	1.4	1.3	1.3	2.81	2.73	2.82	3.8	3.6	3.7
Major Importers	19.7	21.4	22.3	3.44	4.01	3.67	67.9	86.0	81.7
Eastern Europe	6.4	6.7	6.8	3.06	5.01	4.12	19.7	33.7	27.8
EC-12	3.5	3.9	3.7	6.27	6.87	6.89	21.9	26.5	25.6
Other W. Europe	0.2	0.2	0.2	7.98	8.31	8.07	1.8	1.8	1.7
Mexico	6.6	7.7	8.0	2.14	1.88	1.75	14.1	14.5	14.0
FSU-12 2/	2.9	2.8	3.5	3.46	3.18	3.46	9.9	9.0	12.1
Other Maj. Import. 3/	0.1	0.1	0.1	4.99	4.54	4.78	0.5	0.5	0.5
Other Foreign	73.9	74.3	74.7	2.55	2.52	2.52	188.5	187.2	188.4
Brazil	12.9	13.6	13.6	1.84	2.10	2.10	23.7	28.5	28.5
Canada	1.0	1.1	1.1	6.91	6.75	6.60	7.2	7.3	7.0
China	21.4	21.5	21.4	4.52	4.41	4.30	96.8	95.0	92.0
Egypt	0.8	0.7	0.9	5.47	6.24	5.75	4.6	4.4	5.0
India	6.0	5.7	5.8	1.52	1.47	1.55	9.1	8.4	9.0
Indonesia	2.9	2.9	2.9	1.82	1.83	1.83	5.2	5.3	5.3
Philippines	3.9	3.6	3.9	1.32	1.28	1.26	5.1	4.6	4.9
Zimbabwe	1.1	0.9	1.0	1.44	0.59	1.60	1.6	0.5	1.6
Others	24.0	24.3	24.1	1.47	1.37	1.45	35.3	33.2	35.1
<u>SORGHUM</u>									
World	38.7	40.7		1.35	1.32		52.4	53.6	56.9
United States	3.7	4.0		3.96	3.70		14.6	14.7	17.8
Total Foreign	35.1	36.7	36.0	1.08	1.06	1.09	37.9	38.9	39.1
Argentina	0.7	0.7	0.8	3.33	3.47	3.07	2.3	2.5	2.3
Australia	0.4	0.6	0.6	2.22	1.72	2.00	0.9	1.1	1.2
China	1.5	1.4	1.5	3.67	3.50	3.52	5.7	4.9	5.1
India	14.5	15.0	14.8	0.82	0.80	0.81	11.9	12.0	12.0
Mexico	1.3	0.8	0.8	2.85	2.75	2.93	3.7	2.2	2.2
Nigeria	4.4	4.4	4.4	0.64	0.80	0.84	2.8	3.5	3.7
South Africa	0.1	0.1	0.1	2.09	0.70	2.00	0.2	0.1	0.3
Sudan	3.0	4.2	4.1	0.50	0.69	0.68	1.5	2.9	2.8
Thailand	0.2	0.2	0.2	1.42	1.06	1.39	0.3	0.2	0.3
Others	8.9	9.3	8.9	0.97	1.02	1.05	8.7	9.5	9.3

FOOTNOTES AT END OF TABLE.

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TABLE 4
Coarse Grains Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD			PRODUCTION		
	Prel. 1990/91	Proj. 1991/92	Proj. 1992/93	Prel. 1990/91	1992/93 Proj. 1991/92 May		Prel. 1990/91	1992/93 Proj. 1991/92 May	
OATS	---Million hectares---			---Metric tons per hectare---			---Million metric tons---		
World	21.1	20.4		1.88	1.59		39.6	32.5	33.7
United States	2.4	1.9		2.16	1.81		5.2	3.5	4.0
Total Foreign	18.7	18.5	18.0	1.84	1.56	1.65	34.4	28.9	29.7
FSU-12 2/	10.4	10.5	10.3	1.46	1.15	1.30	15.1	12.1	13.4
Maj. Foreign Exporters	2.9	2.9	2.9	2.16	1.80	1.97	6.4	5.3	5.8
Argentina	0.3	0.4	0.4	1.34	1.14	1.29	0.4	0.4	0.5
Australia	1.1	1.3	1.1	1.43	1.15	1.36	1.5	1.5	1.5
Canada	1.2	0.9	1.1	2.34	2.14	2.18	2.9	1.9	2.4
Sweden	0.4	0.3	0.4	4.42	4.13	3.73	1.6	1.4	1.4
Other Foreign	5.4	5.1	4.8	2.41	2.28	2.19	13.0	11.5	10.5
China	0.6	0.6	0.5	1.21	1.18	1.19	0.7	0.7	0.6
Eastern Europe	1.2	1.2	1.2	2.68	2.40	2.22	3.3	3.0	2.6
Czechoslovakia	0.1	0.1	0.1	4.55	4.00	3.57	0.4	0.4	0.3
Poland	0.7	0.7	0.7	2.84	2.65	2.50	2.1	1.9	1.8
EC-12	1.6	1.4	1.3	3.05	3.20	3.15	5.0	4.4	4.1
France	0.2	0.2	0.2	3.88	4.23	4.12	0.8	0.7	0.7
Germany	0.6	0.4	0.4	3.93	4.92	4.61	2.4	1.9	1.8
Finland	0.5	0.3	0.3	3.67	3.37	3.36	1.7	1.2	1.1
Norway	0.1	0.1	0.1	4.38	3.97	3.50	0.6	0.5	0.4
Others	1.4	1.4	1.4	1.30	1.32	1.26	1.8	1.9	1.7
RYE									
World	16.0	13.1		2.31	1.94		37.0	25.5	29.2
United States	0.2	0.2		1.70	1.55		0.3	0.2	0.3
Total Foreign	15.8	13.0	14.8	2.32	1.95	1.95	36.7	25.3	28.9
FSU-12 2/	10.2	8.3	10.2	2.08	1.49	1.64	21.2	12.3	16.7
Maj. Foreign Exporter									
Canada	0.4	0.2	0.2	1.70	1.86	1.72	0.7	0.4	0.3
Other Foreign									
Eastern Europe	2.7	2.6	2.5	2.67	2.60	2.47	7.2	6.8	6.2
Hungary	0.1	0.1	0.1	2.46	2.38	2.86	0.2	0.2	0.2
Poland	2.3	2.3	2.3	2.61	2.58	2.44	6.0	5.9	5.5
Czechoslovakia	0.2	0.1	0.1	4.26	3.80	3.80	0.7	0.5	0.4
EC-12	1.6	1.2	1.1	3.40	3.68	3.54	5.3	4.4	4.1
Denmark	0.1	0.1	0.1	4.95	5.24	4.71	0.5	0.4	0.4
Germany	1.0	0.7	0.7	3.87	4.66	4.48	4.0	3.3	3.0
Others	1.0	0.7	0.8	2.44	1.97	1.99	2.3	1.4	1.6

1/ Total of barley, corn, sorghum, oats, and rye shown below, plus millet and mixed grain. 2/ See note at the bottom of page 2 referencing the FSU-12. Total coarse grains production for the Baltic States in 1990/91, 1991/92, and 1992/93 is estimated at 3.9, 4.0, and 4.0 million metric tons, respectively. 3/ Japan, Republic of Korea, and Taiwan.

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TABLE 5

Rice Area, Yield, and Production World and Selected Countries and Regions

	AREA		YIELD				PRODUCTION (Rough Basis)				MILLING RATE				PRODUCTION (Milled Basis)			
	1989/90	1990/91	1991/92	1989/90	1990/91	1991/92	1989/90	1990/91	1991/92	1991/92	1989/90	1990/91	1991/92	1991/92	1989/90	1990/91	1991/92	1991/92
	—Million hectares—		—Metric tons per hectare—				—Million metric tons—				—Percent—				—Million metric tons—			
World	146.7	147.0	146.1	3.5	3.5	3.5	508.0	520.0	514.0	514.4	67.7	67.8	67.7	67.7	344.1	352.3	348.2	348.4
United States	1.1	1.1	1.1	6.4	6.2	6.3	7.0	7.1	7.0	7.0	72.6	72.0	72.0	72.0	5.1	5.1	5.0	5.0
Total Foreign	145.6	145.9	145.0	3.4	3.5	3.5	501.0	512.9	507.0	507.4	67.7	67.7	67.7	67.5	339.0	347.2	343.1	343.4
Maj. Foreign Exporters	16.8	15.7	16.5	2.3	2.3	2.3	38.5	35.8	38.1	37.9	64.0	63.8	64.1	64.1	24.6	22.8	24.4	24.3
Burma	4.7	4.8	4.5	2.9	2.9	2.8	13.5	13.7	12.8	12.8	60.0	60.0	60.0	60.0	8.1	8.2	7.7	7.7
Pakistan	2.1	2.1	2.0	2.3	2.3	2.4	4.8	4.9	4.8	4.8	66.7	66.7	66.7	66.7	3.2	3.3	3.2	3.2
Thailand	10.0	8.8	10.0	2.0	2.0	2.1	20.2	17.2	20.5	20.3	66.0	66.0	66.0	66.0	13.3	11.3	13.5	13.4
Major Importers	14.0	14.1	13.6	4.2	4.2	4.2	58.6	59.5	56.9	57.4	66.1	66.0	65.9	66.0	38.7	39.2	37.5	37.9
EC-12	0.3	0.4	0.4	6.2	6.4	6.0	2.1	2.4	2.2	2.2	67.0	67.1	65.5	65.2	1.4	1.6	1.4	1.4
Indonesia	10.5	10.5	10.1	4.2	4.3	4.4	44.7	45.2	44.1	44.1	65.0	65.0	65.0	65.0	29.1	29.4	28.7	28.7
Nigeria	0.6	0.7	0.6	1.4	1.4	1.3	0.9	0.9	1.0	0.8	60.0	60.0	60.0	60.0	0.5	0.5	0.6	0.5
Republic of Korea	1.3	1.2	1.2	6.5	6.2	6.1	8.1	7.7	7.4	7.4	72.5	72.5	72.5	72.5	5.9	5.6	5.4	5.4
Other Maj. Import. 1/	1.2	1.3	1.3	2.3	2.5	2.0	2.8	3.2	2.2	2.9	65.5	65.6	65.8	66.0	1.8	2.1	1.5	1.9
Other Foreign	114.8	116.1	114.9	3.5	3.6	3.6	403.8	417.7	412.0	412.1	68.3	68.3	68.3	68.3	275.6	285.2	281.2	281.2
Australia	0.1	0.1	0.1	8.1	8.9	8.2	0.8	0.8	1.1	1.1	71.5	61.8	61.9	61.9	0.6	0.5	0.7	0.7
Bangladesh	10.5	10.4	10.5	2.6	2.6	2.6	26.8	26.8	27.6	27.6	66.7	66.7	66.7	66.7	17.9	17.9	18.4	18.4
Brazil	4.3	4.6	5.1	1.7	2.1	2.1	7.2	9.5	10.8	10.8	68.0	68.0	68.0	68.0	4.9	6.5	7.3	7.3
China	32.7	33.1	32.6	5.5	5.7	5.7	180.1	189.3	186.0	186.0	70.0	70.0	70.0	70.0	126.1	132.5	130.2	130.2
India	42.2	42.6	41.1	2.6	2.6	2.6	110.4	111.9	106.5	106.5	66.7	66.7	66.7	66.7	73.6	74.6	71.0	71.0
Japan	2.1	2.1	2.0	6.2	6.3	5.9	12.9	13.1	12.0	12.0	72.8	72.8	72.8	72.8	9.4	9.6	8.7	8.7
Philippines	3.4	3.4	3.4	2.6	2.9	2.8	8.9	9.9	9.7	9.7	65.0	65.0	65.0	65.0	5.8	6.4	6.3	6.3
FSU-12 2/	0.7	0.6	0.6	3.4	3.5	3.7	2.3	2.2	2.2	2.0	65.0	64.3	65.0	65.0	1.5	1.4	1.4	1.3
Vietnam	6.1	6.1	6.3	3.2	2.9	3.2	19.4	17.9	19.9	19.9	66.0	66.0	66.0	66.0	12.8	11.8	13.1	13.1
Others	12.8	13.1	13.2	2.7	2.8	2.7	35.1	36.3	36.2	36.5	66.1	66.2	66.3	66.2	23.2	24.0	24.0	24.2

1/ Hong Kong, Iran, Iraq, Ivory Coast, and Saudi Arabia.

2/ See note at the bottom of page 2 referencing the FSU-12.

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TABLE 6
Oilseeds Area, Yield, and Production
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel.		Proj.	Prel.		1991/92 Proj.		Prel.		1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	April	May	1989/90	1990/91	April	May
	---Million hectares---			---Metric tons per hectare---				---Million metric tons---			
<u>SOYBEANS</u>											
World	58.37	54.05	54.59	1.84	1.92	1.93	1.93	107.37	103.99	105.37	105.42
United States	24.09	22.87	23.45	2.17	2.29	2.30	2.30	52.35	52.42	54.04	54.04
Total Foreign	34.27	31.18	31.14	1.61	1.65	1.65	1.65	55.01	51.58	51.33	51.38
Maj. Foreign Exporters	16.35	14.45	14.80	1.90	1.89	1.95	1.95	31.09	27.25	28.80	28.80
Argentina	4.95	4.80	4.80	2.17	2.40	2.15	2.15	10.75	11.50	10.30	10.30
Brazil	11.40	9.65	10.00	1.78	1.63	1.85	1.85	20.34	15.75	18.50	18.50
Other Foreign	17.92	16.73	16.34	1.33	1.45	1.38	1.38	23.92	24.33	22.53	22.58
Canada	0.54	0.49	0.58	2.26	2.63	2.44	2.44	1.22	1.29	1.41	1.41
China	8.06	7.56	7.05	1.27	1.46	1.36	1.36	10.23	11.00	9.60	9.60
Eastern Europe	0.70	0.34	0.25	0.97	1.06	1.35	1.34	0.68	0.36	0.33	0.34
EC-12	0.63	0.69	0.54	3.13	3.10	3.11	3.11	1.98	2.14	1.68	1.68
India	2.25	2.37	2.60	0.80	1.02	0.85	0.85	1.81	2.42	2.20	2.20
Indonesia	1.21	1.22	1.24	1.09	1.08	1.04	1.04	1.32	1.32	1.29	1.29
Paraguay	0.98	0.89	0.90	1.61	1.46	1.78	1.78	1.58	1.30	1.60	1.60
Fmr. USSR 1/	0.83	0.83	0.81	1.15	1.06	1.14	1.14	0.96	0.88	0.92	0.92
Others	2.73	2.36	2.37	1.53	1.54	1.47	1.49	4.17	3.63	3.50	3.55
<u>COTTONSEED</u>											
World	31.62	33.08	34.45	0.97	1.01	1.07	1.06	30.83	33.50	36.59	36.59
United States	3.86	4.75	5.25	1.10	1.14	1.18	1.20	4.24	5.42	6.13	6.28
Total Foreign	27.76	28.33	29.21	0.96	0.99	1.05	1.04	26.59	28.09	30.45	30.30
China	5.20	5.59	6.35	1.24	1.37	1.52	1.52	6.44	7.67	9.62	9.62
India	7.33	7.36	7.27	0.60	0.53	0.54	0.54	4.40	3.90	3.90	3.90
Pakistan	2.60	2.66	2.88	1.12	1.23	1.57	1.51	2.91	3.28	4.36	4.36
Fmr. USSR 1/	3.33	3.17	3.00	1.53	1.54	1.48	1.45	5.11	4.88	4.45	4.35
Others	9.30	9.56	9.71	0.83	0.88	0.83	0.83	7.73	8.37	8.12	8.08
<u>PEANUTS</u>											
World	19.82	19.40	20.07	1.11	1.15	1.13	1.13	22.06	22.26	22.67	22.59
United States	0.67	0.73	0.82	2.72	2.23	2.74	2.74	1.81	1.63	2.24	2.24
Total Foreign	19.15	18.67	19.25	1.06	1.10	1.06	1.06	20.25	20.63	20.44	20.36
Argentina	0.18	0.20	0.19	1.87	2.37	2.11	2.11	0.34	0.48	0.40	0.40
China	2.96	2.91	2.98	1.81	2.19	2.08	2.08	5.37	6.37	6.20	6.20
India	8.71	8.30	8.75	0.93	0.92	0.86	0.86	8.10	7.62	7.50	7.50
Senegal	0.78	0.91	0.87	1.04	0.74	0.83	0.83	0.82	0.67	0.72	0.72
South Africa	0.09	0.09	0.20	1.28	1.21	0.56	0.56	0.11	0.10	0.11	0.11
Sudan	0.55	0.54	0.53	0.73	0.60	0.75	0.75	0.40	0.33	0.40	0.40
Others	5.88	5.73	5.73	0.87	0.88	0.88	0.88	5.12	5.06	5.10	5.02

FOOTNOTES AT END OF TABLE.

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TABLE 6
Oilseeds Area, Yield, and Production
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel.		Proj.	Prel.		1991/92 Proj.		Prel.		1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	April	May	1989/90	1990/91	April	May
<u>SUNFLOWERSEED</u>	---Million hectares---			---Metric tons per hectare---				---Million metric tons---			
World	15.64	16.36	16.45	1.40	1.38	1.26	1.25	21.89	22.56	20.75	20.59
United States	0.72	0.75	1.08	1.10	1.38	1.51	1.51	0.80	1.03	1.64	1.64
Total Foreign	14.92	15.61	15.37	1.41	1.38	1.24	1.23	21.09	21.53	19.12	18.95
Argentina	2.80	2.30	2.50	1.36	1.70	1.40	1.32	3.80	3.90	3.50	3.30
China	0.72	0.71	0.75	1.49	1.88	1.47	1.47	1.06	1.34	1.10	1.10
EC-12	2.13	2.58	2.40	1.67	1.65	1.66	1.66	3.54	4.25	3.99	3.99
East Europe	1.27	1.23	1.27	1.81	1.71	1.71	1.73	2.29	2.10	2.13	2.19
Fmr. USSR 1/	4.46	4.67	4.50	1.59	1.41	1.25	1.25	7.07	6.56	5.64	5.64
Others	3.55	4.13	3.96	0.94	0.82	0.69	0.69	3.33	3.38	2.76	2.73
<u>RAPESEED</u>											
World	17.11	18.24	20.52	1.28	1.38	1.40	1.40	21.87	25.15	28.59	28.66
United States	0.03	0.03	0.06	1.58	1.74	1.43	1.43	0.05	0.05	0.08	0.08
Total Foreign	17.08	18.21	20.46	1.28	1.38	1.39	1.40	21.82	25.10	28.51	28.57
Canada	2.90	2.58	3.27	1.07	1.27	1.32	1.32	3.10	3.28	4.30	4.30
China	4.99	5.50	6.10	1.09	1.26	1.22	1.22	5.44	6.96	7.44	7.44
EC-12	1.81	2.13	2.42	2.96	2.89	3.05	3.05	5.34	6.14	7.39	7.39
East Europe	0.81	0.74	0.71	2.66	2.39	2.30	2.28	2.15	1.76	1.58	1.63
India	4.97	5.72	6.30	0.83	0.90	0.95	0.95	4.13	5.15	6.00	6.00
Others	1.60	1.54	1.66	1.04	1.17	1.07	1.10	1.68	1.81	1.80	1.82
<u>FLAXSEED</u>											
World	3.68	3.74	3.40	0.50	0.61	0.61	0.61	1.84	2.28	2.10	2.09
United States	0.07	0.10	0.14	0.47	0.95	1.14	1.14	0.03	0.10	0.16	0.16
Total Foreign	3.62	3.64	3.27	0.50	0.60	0.59	0.59	1.81	2.18	1.94	1.94
Argentina	0.58	0.58	0.42	0.90	0.83	0.86	0.86	0.52	0.48	0.36	0.36
Canada	0.60	0.73	0.53	0.83	1.29	1.30	1.30	0.50	0.94	0.69	0.69
India	1.12	1.15	1.10	0.29	0.30	0.32	0.32	0.33	0.34	0.35	0.35
Fmr. USSR 1/	0.97	0.85	0.85	0.24	0.19	0.21	0.21	0.23	0.16	0.18	0.18
Others	0.36	0.34	0.37	0.67	0.77	0.94	0.97	0.24	0.26	0.36	0.36
<u>MAJOR OILSEEDS</u>	146.25	144.88	149.49	1.41	1.45	1.45	1.44	205.85	209.74	216.07	215.93
United States	29.44	29.23	30.79	2.01	2.07	2.09	2.09	59.29	60.65	64.28	64.43
Total Foreign	116.80	115.65	118.70	1.25	1.29	1.28	1.28	146.57	149.09	151.79	151.50
<u>COPRA</u>	--	--	--	--	--	--	--	5.13	4.74	4.57	4.43
<u>PALM KERNEL</u>	--	--	--	--	--	--	--	3.33	3.32	3.49	3.50
<u>TOTAL OILSEEDS</u>	--	--	--	--	--	--	--	214.32	217.80	224.13	223.86
<u>PALM OIL 2/</u>	--	--	--	--	--	--	--	10.92	11.23	11.69	11.69

1/ Fmr. USSR covers the same area previously designated USSR. 2/ Not included in total oilseeds.

TABLE 7

Cotton Area, Yield, and Production World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel.	Proj.	1991/92	Prel.	1991/92 Proj.		Prel.	1991/92 Proj.			
	1989/90	1990/91		1989/90	1990/91	Apr.	May	1989/90	1990/91	Apr.	May
	---Million hectares---			---Kilograms per hectare---				---Million 480-pound bales---			
World	31.6	33.0	34.3	551	573	606	605	79.9	87.0	95.4	95.2
United States	3.9	4.7	5.2	688	711	735	731	12.2	15.5	17.5	17.6
Total Foreign	27.7	28.3	29.0	532	550	583	582	67.7	71.5	77.8	77.6
Maj. Foreign Exporters	13.1	13.2	14.0	725	790	847	845	43.5	48.0	54.4	54.3
Australia	0.2	0.3	0.3	1,271	1,604	1,340	1,422	1.4	2.0	1.7	1.8
Central America 1/	0.1	0.1	0.1	832	810	742	742	0.3	0.3	0.3	0.3
China	5.2	5.6	6.4	728	807	891	891	17.4	20.7	26.0	26.0
Egypt	0.4	0.4	0.4	683	719	816	816	1.3	1.4	1.4	1.4
Mexico	0.2	0.2	0.3	891	914	707	707	0.8	0.8	0.8	0.8
Pakistan	2.6	2.7	2.9	560	615	756	756	6.7	7.5	10.0	10.0
Sudan	0.3	0.2	0.2	456	422	494	494	0.6	0.4	0.4	0.4
Turkey	0.7	0.6	0.6	851	1,021	947	947	2.8	3.0	2.6	2.6
Fmr. USSR 2/	3.3	3.2	3.0	796	818	817	800	12.2	11.9	11.3	11.0
Major Importers 3/	0.4	0.4	0.3	887	785	859	859	1.5	1.4	1.4	1.4
Other Foreign	14.3	14.7	14.7	346	327	326	325	22.6	22.1	22.0	22.0
Argentina	0.6	0.6	0.6	486	468	415	404	1.3	1.4	1.2	1.2
Brazil	1.9	2.0	2.1	347	352	376	376	3.0	3.2	3.6	3.6
India	7.3	7.4	7.3	315	270	274	274	10.6	9.1	9.1	9.1
Syria	0.2	0.2	0.2	930	928	979	979	0.7	0.7	0.9	0.9
Others	4.3	4.6	4.6	357	368	346	347	7.0	7.7	7.3	7.3

1/ Nicaragua, Guatemala, El Salvador, Honduras, and Costa Rica.

2/ Fmr. USSR covers the same area previously designated USSR.

3/ Western Europe, Eastern Europe, Japan, Hong Kong, Republic of Korea, and Taiwan.

May 1992

Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 8

The table below presents a 10-year record of the difference between the May projections and the final estimates. Using world wheat production as an example, changes between the May projection and the final estimate have averaged 14.5 million tons (2.8 percent) and ranged from -25.1 to 20.6 million tons. The May projection has been below the final 6 times and above the final 5 times.

RELIABILITY OF PRODUCTION PROJECTIONS

COMMODITY AND REGION	PROJECTION AND FINAL ESTIMATES, 1981/82 – 1991/92 1/					
	Difference		Lowest	Highest	Below	Above
	Average	Average	Difference		Final	Final
	Percent	---Million metric tons---			Number of years 2/	
WHEAT						
World	2.8	14.5	–25.1	20.6	6	5
U.S.	4.4	2.6	–4.3	9.8	5	6
Foreign	2.9	12.8	–23.9	20.0	6	5
COARSE GRAINS 3/						
World	3.5	26.4	–31.9	75.3	5	6
U.S.	12.7	23.4	–30.2	70.3	5	6
Foreign	2.1	11.8	–21.2	28.1	3	8
RICE (Milled)						
World	3.0	9.5	–21.8	11.4	8	3
U.S.	6.2	0.3	–1.0	0.5	6	5
Foreign	3.1	9.5	–22.0	11.2	8	3
SOYBEANS						
World	N/A	N/A	N/A	N/A	N/A	N/A
U.S.	8.1	3.9	–4.7	12.0	6	5
Foreign	N/A	N/A	N/A	N/A	N/A	N/A
		---Million 480-lb. bales---				
COTTON						
World	4.6	3.8	–13.7	5.9	8	3
U.S.	10.5	1.4	–2.8	1.3	6	5
Foreign	4.0	2.8	–12.2	4.6	7	4
UNITED STATES		-----Million bushels-----				
CORN	13.4	787	–990	2,379	4	7
SORGHUM	16.0	116	–228	171	6	5
BARLEY	12.8	51	–73	206	6	5
OATS	21.4	67	–77	231	3	8

1/ The final estimate for 1981/82-1990/91 is defined as the first November estimate following the marketing year.

2/ May not total 11 if projection was the same as the final.

3/ Includes corn, sorghum, barley, oats, rye, millet, and mixed grain.

WORLD AGRICULTURAL WEATHER HIGHLIGHTS

MAY 11, 1992



1 - UNITED STATES

Unseasonably warm, drier weather aids fieldwork in the southwest and Gulf Coastal States. Highly variable temperatures and rainfall limit early fieldwork in the east. Dryness stresses wheat in the west-central Great Plains, but the soft red winter wheat crop improves.

2 - CANADA

Soils are too dry in the southwestern Prairies for spring planting. Planting is just beginning elsewhere.

3 - SOUTH AMERICA

Recent drier weather improves soybean harvest progress in southern Brazil, after earlier rain delays. Favorable harvest weather exists in Argentina.

(More details are available in the *Weekly Weather and Crop Bulletin*.
Subscription information may be obtained by calling (202) 720-7917.)

4 - EUROPE

Beneficial April rains help winter crops in England, France and Italy. Below normal rain aggravates low moisture supplies in Spain. Moisture is favorable for crop development in the north. In Hungary, crops have inadequate moisture going into weather-sensitive growth phases.

5 - FSU: WEST

Winter grains break dormancy. Adequate moisture favors vegetative wheat and emerging spring grains.

6 - FSU: NEW LANDS

Topsoil moisture is adequate for spring grain planting. Subsoil moisture remains limited following last summer's drought.

7 - SOUTH ASIA

Winter harvests progress across India but rain slows fieldwork in Pakistan. Pre-planting showers develop in southern and eastern rice areas of India and Bangladesh.

8 - EASTERN ASIA

Early May showers help vegetative to reproductive winter wheat in the North China Plain, following below normal April rainfall. Drier weather eases flooding across southern China.

9 - SOUTHEAST ASIA

Showers develop over Thailand but hot weather persists in corn areas. Soils are too dry for Philippine grains. The rainy season is winding down over Java.

10 - AUSTRALIA

Near to below normal April rainfall promotes eastern summer crop harvesting. Soil moisture for the upcoming winter wheat planting season is low in the southeast and favorable in the west.

11 - NORTHWESTERN AFRICA

Above-normal April rainfall in northern Morocco, Algeria and Tunisia benefits immature crops.

WEATHER BRIEFS

NORTHWEST AFRICA: GRAINS RECEIVE BENEFICIAL RAIN

Rainfall during the period of April 1 - May 10, 1992 was frequent and timely across central and eastern Algeria and the northern half of Tunisia. This precipitation continued the trend for beneficial rainfall seen during March in Algeria and reversed a drying trend in Tunisia, helping winter grains in the filling stage. Rainfall was generally 5-25 millimeters per week since April 1. North African winter grain harvesting normally begins in May and extends into July.

During the first and third weeks of April 1992, Morocco received light-to-moderate rainfall. Rainfall was heaviest in the north where winter grains were least advanced and could benefit most. However, due to dryness throughout much of the winter, yield potential likely has already been reduced from normal due to low tiller counts.

SOUTHEAST EUROPE: DRYNESS CONTINUES

Precipitation has been well below normal across portions of southeast Europe from November 1, 1991 - May 10, 1992. Eastern Hungary, eastern Yugoslavia, western Romania, and all but southern Bulgaria are the driest areas. Eastern Hungary last received normal monthly precipitation during October, 1991. Winter and spring dryness stressed winter grains which are in the boot or pre-heading stage, and low soil moisture caused concern for summer crop planting. Areas of Romania, Bulgaria, and Yugoslavia are undergoing similar dryness. However, the driest areas of these countries received some precipitation in mid-April (10-25 millimeters). This precipitation provided temporary relief for winter grains and moistened top soils for summer crop planting.

FORMER SOVIET UNION: ADEQUATE SOIL MOISTURE FOR WINTER GRAINS

As of May 10, 1992, soil moisture was adequate for continued favorable growth and development of winter grains across the western portion of the former Soviet Union. Dry conditions, seen during planting across parts of Ukraine, the lower Volga Valley, and the North Caucasus ended with normal-to near-normal seasonal precipitation during November 1, 1991 - May 5, 1992. Timely precipitation maintained favorable growing conditions for winter grains. However, below normal precipitation for April across southern Ukraine and portions of the Volga Valley warrants monitoring.

Temperatures across the west were mild and above normal during much of the winter. Therefore, losses of winter grains due to "winterkill" were below average. Temperatures fell below-normal across eastern Ukraine, the Black Soils, the North Caucasus, and the Volga Valley during April 19 - May 5, 1992. This cooling trend slowed the development of winter grains. During this same period, weather in western Ukraine was warmer than normal.

PRODUCTION BRIEFS

ARGENTINA: PLANTING INTENTIONS FOR WHEAT

Argentine farmers are expected to increase the planted area of winter wheat and increase production for the 1992/93 crop, according to the U.S. agricultural counselor in Buenos Aires. Harvested area is expected to increase by over 20 percent, rebounding to the level of 1989/90. Winter grain growing areas of Argentina reportedly have favorable soil moisture for winter wheat planting, germination, and development. Planting has started and will continue through July; the crop will be harvested November through January.

Several factors have improved since last year. Argentina's current macroeconomic situation is stable. World wheat prices are higher than last year and input prices have decreased relative to wheat prices. However, there are negative factors. The biggest obstacle to increasing area is the overvalued Argentine peso. Last year, the rate of exchange was fixed by law at a maximum of 1 peso to 1 US\$1.00. Inflation continues to be a problem, although not at the hyperinflation rate of a few years ago. Inflation has eroded 30 to 45 percent of wheat's sale value since last year. The overvalued currency has made imports of seed, fertilizer, and agrochemicals less expensive, but has made Argentina's agricultural exports more expensive.

The current government policy is to minimize intervention in the grain market. In addition, the continued privatization of grain storage and transport bodes well for decreasing production costs. The Government has long-term trade agreements with Brazil and Algeria, but there are no direct price support programs. Export taxes for wheat were eliminated in November 1990.

BRAZIL: ESTIMATE FOR 1990/91 ORANGE CROP REVISED UPWARD

The U.S. agricultural officer in Sao Paulo has increased the estimate for Brazil's 1990/91 orange crop to 12.36 million, tons, a 3-percent increase over the December 1991 estimate of 11.95 million. The revision reflects a 430,000 ton increase in the Sao Paulo crop, currently estimated at 10.20 million tons (250 million 90-pound boxes).

BRAZIL: TOBACCO CROP FORECAST AT RECORD LEVEL IN 1992

According to the U.S. agricultural officer in Sao Paulo, the 1992 tobacco crop is forecast at 523,000 tons (farm sales weight), up 24 percent from last year's weather-damaged crop and 4 percent above the December estimate. Area planted is reportedly up 11 percent, to 320,000 hectares. Production of flue-cured, light air-cured, and burley tobaccos in the South region is projected at a record 450,000 tons, due to a 15-percent increase in plantings and higher yields. Grower prices paid for the 1992 crop in the South region increased 30 percent over the 1991 level, to US\$1.47 per kilogram. Production of dark air/sun-cured and cigar tobaccos in the North region is forecast at 73,000 tons, down slightly from last year because of a decline in yields.

CHINA: TOBACCO PRODUCTION AT RECORD LEVEL IN 1991

The U.S. agricultural counselor in Beijing reports that tobacco production totaled a record 2.94 million tons (farm sales weight) in 1991. Current assessments indicate output will expand again in 1992. However, the percentage increase is not expected to be as large because stricter grade standards have been implemented in order to limit the production of low quality cigarettes.

Estimates for tobacco area and production (farm sales weight) are as follows in million of hectares and million of tons:

<u>Year</u>	<u>Area planted</u>	<u>Production</u>
1990	1.592	2.627
1991	1.660	2.940
1992	1.680	3.057 <u>1/</u>

1/ Preliminary.

COSTA RICA: POULTRY MEAT PRODUCTION INCREASES IN 1991

Production of poultry meat totaled 47,500 tons in 1991, a 10-percent increase from 1990, according to the U.S. agricultural attache in San Jose. The two large companies that control most of the country's production have utilized advertising, expanded the availability of high-value processed products, and integrated smaller companies into the production process in an effort to expand the market for poultry meat.

MALAWI/ZIMBABWE: TOBACCO PRODUCTION FORECASTS FOR 1992

According to a report by the International Tobacco Growers Association, there are no alternatives to tobacco farming in Malawi and Zimbabwe because most of the potential replacement crops would take several years to yield returns and are difficult to market. Commercial tobacco production was established in Malawi and Zimbabwe during colonial rule. Tobacco production in Zimbabwe reached current production levels in the 1960's. The tobacco sector in Malawi began expanding during the 1970's, from less than 30,000 tons per year to over 100,000 by 1990. Malawi's 1992 tobacco crop is forecast at 126,900 tons, 1 percent above 1991, but 3 percent below the December forecast. Production in Zimbabwe for 1992 is estimated at a record 195,250 tons, up 10 percent from 1991, but 3 percent less than the December forecast of 201,060 tons because of drought.

POLAND: PRODUCTION CONTINUES TO DECLINE IN POULTRY SECTOR

Poland's production of poultry meat declined to 320,000 tons in 1991, according to the U.S. agricultural counselor in Warsaw. This is the third consecutive decline since 1988 when the industry produced 351,000 tons of poultry meat. Output of eggs in 1991 totaled 6.5 billion eggs, approximately 15 percent below the 1990 level. The continuing slump in poultry meat and egg production primarily is due to low prices stemming from a lack of consumer purchasing power.

SPAIN: CITRUS PRODUCTION DECLINES IN 1991/92

The U.S. agricultural counselor in Madrid has revised the 1991/92 citrus crop estimate to 4.43 million tons, 53,000 tons above the December forecast, but 8 percent below the revised estimate for the 1990/91 crop. Last year's cold spring weather caused below normal fruit set for the 1991/92 crop. Current blooming conditions for the 1992/93 crop in the major citrus producing areas are only fair to average due to unusually high temperatures. Orange production for 1991/92 remains unchanged from the December forecast of 2.49 million tons, but the estimate for 1990/91 has been revised upward by 1 percent, to 2.59 million tons. Tangerine production for 1991/92 has been increased 5 percent, to 1.40 million tons. The 1990/91 production estimate has been raised 4 percent, to 1.57 million tons. Lemon production in 1991/92 has been reduced 3 percent, to 510,000 tons. The 1990/91 crop estimate has been increased almost 2 percent, to 630,000 tons.

WORLD CENTRIFUGAL SUGAR PRODUCTION

The preliminary forecast for 1992/93 world centrifugal sugar production is 113.4 million tons (raw value), 1 percent above the 1991/92 revised total of 112.6 million, but slightly below the 1990/91 record of 113.6 million. In Asia, the world's largest producing region accounting for 32 percent of world production, sugar outturn is forecast to increase 2 percent during the 1992/93 season, to 36.1 million tons. In the European Community and in South America, the 1992/93 forecast is up less than 1 percent from a year ago, to 16.0 and 14.8 million tons, respectively. Production in the Caribbean is expected to increase marginally, to 7.2 million tons. In Sub-Saharan Africa, the 1992/93 forecast is 5.2 million tons, down 15 percent from 1991/92.

The European Community (EC) accounts for 14 percent of the world's total sugar production. EC output is forecast at nearly 16.0 million tons, an increase of 1 percent from 1991/92. In France, the largest producer in the EC, sugar outturn is forecast at 4.4 million tons, about the same level as last season. Several industrial projects to produce fuel ethanol have been announced in recent months, following the Government's decision to encourage the production of "biofuels". French sugarbeet and grain producers have obtained a tax exemption for this fuel. Germany, one of western Europe's most important sugar manufacturers, is expected to produce 4.3 million tons in 1992/93, up 1 percent from 1991/92. Sugar production is one of the most lucrative enterprises for German farmers. In 1991, average gross margins were 3 times higher than those for wheat. For this reason, German officials have heavily lobbied their counterparts on the EC Commission to grant farmers in eastern Germany a relatively high sugar quota that significantly exceeds domestic demand. The

German sugar industry is becoming increasingly concentrated as companies merge and smaller, older facilities in western Germany are closed. At the same time, the renovation of and investment in the sugar industry in eastern Germany continues unabated. The objective is to build modern, efficient facilities ready for operation by 1994/95.

India, the world's largest sugar producer, is expected to produce a record 1992/93 crop of 14.8 million tons (including 828,000 tons of Khandsari), 1 percent more than last season's record harvest. India's sugar sector has had to cope with complex industrial and agricultural policies as well as weather anomalies. Record production has led to a stock buildup because growth in domestic consumption has not kept pace. While exports have increased significantly, the industry will have a hard time sustaining greater levels of exports since world prices are currently below both domestic prices and the average mill's cost of production. Mills are trapped between the Central Government's authority over marketing to prevent basic price inflation and State Government control of pricing, which favors growers. Some industry observers forecast a virtual collapse of sugar production in 1993/94, precipitated by the mills' inability to make full payment to farmers for sugarcane harvested in 1991/92.

In the 12 newly independent states of the former Soviet Union (FSU-12; excludes the Baltic States), the 1992/93 forecast of 6.8 million tons is up 1 percent from last season, but down 25 percent from the level produced in the FSU-12 in 1990/91. Although the outlook for the 1992/93 season is not especially favorable, some improvement is expected over the poor 1991/92 outturn. Many of the usual problems--notably shortages in input supplies--continue to hamper producers. The dismemberment of the USSR shattered many of the intertwining economic ties among the FSU-12. For the short run, the output of the individual economies will be less than the whole economy of the former Soviet Union. This phenomenon results from the breakdown in distribution of goods from producing zones located in one State to processing and marketing areas situated in a different State. While interest generally seems high, private farmers appear to be off to a rocky start in most States. Private farmers continue to face difficulties in accessing suitable machinery and other farm inputs. Given the size of their holdings and lack of access to appropriate inputs, private farmers, in all likelihood, will not contribute significantly to overall sugar output in 1992/93.

The 1992/93 Brazilian sugar crop is essentially unchanged from last year's output, but is 15 percent larger than the 1990/91 crop. Sugarcane milling for both the 1992/93 sugar and alcohol crops is scheduled to begin about mid-May in the Center-South region and in September in the North-Northeast region. Sugar and ethanol production limits are set annually by the Government. Although not specifically expressed in the annual production plan, these limits should always be considered minimal rather than actual or maximum, since they are almost always revised upward during the milling season, provided sugarcane is available. If there is excess sugarcane and world market prices are depressed, the Government likely will chose to produce ethanol rather than sugar. The Government of Brazil is not expected to announce its 1992/93 (June-May) sugar and alcohol production plan in the near future because of recent changes in Cabinet members. The Secretary for Regional Development, under whose jurisdiction sugar and alcohol policy fall, had not been appointed as of late April.

In China, the third largest sugar producer in the world, output is forecast up by 9 percent, to 7.6 million tons, exceeding the 1991/92 record crop by 600,000 tons. The most important development in China's sugar industry is the Government's recent decision to liberate the marketing, procurement, and internal distribution of sugar. Quotas, rationing, and set prices have been eliminated. Within the Government, there is growing concern that sugar production is expanding too rapidly. However, falling prices are likely to limit the rate of expansion, at least until demand in rural areas can be tapped. Despite the temporary concerns of overproduction, mills are attempting to increase milling capacity and extraction rates. Continued improvements in irrigation and fertilizer distribution, crop management, and the increased use of sophisticated crushing and refining equipment is expected to contribute to expanded production in 1992/93. Some officials are questioning the wisdom of pursuing the 10.7 million ton production target set for the year 2000 because of procurement, storage, and distribution problems experienced with the 1991/92 record crop.

Sugar production in Asia is forecast to increase in four of the six major producing countries. India and China, as discussed above, are expected to increase production. In Thailand, the 1992/93 forecast is unchanged from the record 5.0 million tons produced during 1991/92. The Ministry of Industry is responsible for setting production quotas for the individual mills based on the past 3 years' crushing performance, an assessment of the sugarcane crop, local demand for white sugar, long-term export contracts, and the residual sugar available for export. The Royal Thai Government (RTG) provides a credit program under which farmers can borrow, at below market interest rates, an amount equivalent to their advance payment from the mills. It also provides "packing credits" to the sugar industry. These credits are discount-rate financing provided by the Bank of Thailand to interested millers and exporters, allowing them to offer credit terms to buyers.

Philippine sugar production for 1992/93 is forecast at 1.9 million tons, up 1 percent from 1991/92 and 9 percent above 1990/91. The forecast depends, in part, on the vagaries of the annual monsoon rains, typhoons, and conditions during the dry season which create the potential for highly variable crop conditions. The outlook reflects the likelihood of expanded area in regions where idled mills were restarted during the 1991/92 season. There were 39 out of a total of 42 sugar mills grinding sugarcane in 1991/92, operating at an estimated 60 to 70 percent of rated capacity. However, it is still uncertain what impact low sugar prices will have on planting decisions of small-scale sugarcane growers for the 1992/93 crop. The Sugar Regulatory Administration (SRA) and major Luzon mills report that, despite some sugarcane area lost to Mount Pinatubo ash and mud flows, south-central Luzon actually was helped by the ash which enhanced soil fertility. Most of the modernization plans for the milling industry have stalled despite the fact that 70 percent of the 39 operating mills are 1920's vintage or earlier. The industry's modernization plans have been hampered mostly by the cost of financing which, in 1991/92, varied from 25 to 30 percent. Both the sugar industry and the SRA are now projecting a domestic consumption need that will soon outstrip production. The industry forecasts domestic demand at 2.5 million tons by the year 2000. Policies regarding sugar pricing and land reform will clearly have to be addressed in order to achieve a production target that will meet both growing domestic needs and export opportunities.

In Indonesia, the sugar production forecast of 2.1 million tons for the 1992/93 season is 5 percent less than in 1991/92. The decline is due to the delayed impact of the drought in producing areas of Java and Lampung. The effect of dry conditions on sugar production in 1991/92 is expected to be less severe than originally projected because the industry increased its production capacity through limited expansion of existing mills and the opening of a new sugar mill in North Sulawesi. The Government of Indonesia (GOI) adheres to a policy of achieving self-sufficiency in sugar production. Helping to attain this goal are efforts to rehabilitate and increase capacity at existing mills. Recent investment in new mills and plantations in Lampung (southern Sumatra) and North Sulawesi could add about 400,000 tons of sugar, per year, over the next four years. Attainment of self-sufficiency will probably be delayed for several years because of the conversion of prime agricultural land on Java to other uses and higher demand resulting from population increases and improved incomes. Aside from the drought, the two most important factors affecting sugar production in Indonesia are the conversion of irrigated land from agricultural to non-agricultural use and the development of the sugar industry on islands other than Java. The pace of land conversion from agriculture to industrial development and urban sprawl is estimated at 30,000 hectares per year.

The Mexican sugar production forecast for 1992/93 is 3.6 million tons, up 3 percent from 1991/92. Mexico is expected to continue to experience production shortages because of population growth and expansion of the economy. The Mexican sugar industry is still in the process of restructuring. Domestic sugar prices continue to be controlled and are currently adjusted monthly according to a formula that pegs the Peso exchange rate to the U.S. dollar.

Recent land reforms may have a significant impact on the sugar industry in Mexico. In an attempt to address some of the shortcomings of the domestic sugar market, there is an effort underway to create several private, regional trading entities to oversee the sale and distribution of sugar throughout Mexico.

Sugar production in the Republic of South Africa for 1992/93 is forecast at 1.8 million tons, a 24-percent decrease in output from last year due to drought since the beginning of January 1992. Although there were beneficial rains from October through December 1991, during the important growth period from January to March there was no rainfall to offset the damaging affects of seasonally high temperatures. To date, irrigation water supplies have been sufficient for those areas that are irrigated, but the important Crocodile river irrigation area in the Eastern Transvaal has begun to develop water supply shortages.

Australian sugar production for 1992/93 is forecast at 3.5 million tons, up 10 percent from a year ago, reflecting a return to more favorable growing conditions following last year's drought in New South Wales and Queensland. The Australian sugar industry is currently in an expansion phase. Sugarcane area is increasing substantively for the first time since 1981 and new growers are entering the industry for the first time since 1965.

Franklin Hokana (202) 720-0875

TABLE 9
WORLD CENTRIFUGAL SUGAR PRODUCTION 1/
(1,000 Metric tons)

	1989/90	1990/91	1991/92	1992/93 3/
NORTH AMERICA				
Canada	121	138	160	135
Mexico	3,100	3,600	3,500	3,620
United States 2/ 4/	6,008	6,273	6,532	6,804
Total	9,229	10,011	10,192	10,559
SOUTH AMERICA				
Argentina	944	1,300	1,570	1,500
Bolivia	180	225	230	230
Brazil	7,793	7,900	9,133	9,100
Chile	448	370	360	460
Colombia	1,611	1,595	1,653	1,690
Ecuador	331	355	349	360
Guyana	130	162	217	230
Paraguay	120	100	110	120
Peru	620	585	500	500
Surinam	1	1	1	1
Uruguay	75	70	80	80
Venezuela	495	510	540	545
Total	12,748	13,173	14,743	14,816
CENTRAL AMERICA				
Belize	102	104	102	100
Costa Rica	245	265	290	300
El Salvador	211	270	349	300
Guatemala	875	1,015	1,149	1,200
Honduras	199	191	199	200
Nicaragua	198	217	250	270
Panama	114	126	127	115
Total	1,944	2,188	2,466	2,485
CARIBBEAN				
Barbados	69	65	50	50
Cuba	8,000	7,620	6,000	6,000
Dominican Republic	636	580	600	625
Guadeloupe	60	60	35	40
Haiti	35	30	30	30
Jamaica	219	237	230	240
Martinique	2	2	2	3
Puerto Rico	62	67	64	65
St. Kitts and Nevis	25	15	20	20
Trinidad and Tobago	121	104	116	110
Total	9,229	8,780	7,147	7,183
EC-12				
Belgium-Luxembourg	1,039	1,116	967	960
Denmark	529	591	508	500
France 5/	4,204	4,736	4,423	4,400
Germany	4,087	4,672	4,245	4,300
Greece	421	315	310	300
Ireland	233	227	230	220
Italy	1,803	1,587	1,640	1,750
Netherlands	1,241	1,341	1,137	1,150
Portugal	2	2	2	2
Spain	1,037	1,036	1,024	1,040
United Kingdom	1,322	1,360	1,330	1,350
Total	15,918	16,983	15,816	15,972
OTHER WESTERN EUROPE				
Austria	457	451	466	500
Finland	168	176	161	150
Sweden	401	419	252	360
Switzerland	152	160	136	150
Total	1,178	1,206	1,015	1,160

FOOTNOTES AT END OF TABLE

MAY 1992

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 9 (Continued)
WORLD CENTRIFUGAL SUGAR PRODUCTION 1/
(1,000 Metric tons)

	1989/90	1990/91	1991/92	1992/93 3/
EASTERN EUROPE				
Albania	16	14	15	10
Bulgaria	60	80	70	70
Czechoslovakia	878	700	780	800
Hungary	630	550	700	600
Poland	1,865	2,214	1,642	1,500
Romania	499	334	430	500
Yugoslavia	930	885	850	900
Total	4,878	4,777	4,487	4,380
FSU-12 6/	9,425	9,043	6,725	6,800
Baltics 7/	135	117	125	125
NORTH AFRICA				
Algeria	10	10	10	10
Egypt	957	982	950	1,010
Morocco	494	519	519	460
Sudan	420	480	500	500
Tunisia	35	37	27	40
Total	1,916	2,028	2,006	2,020
SUB-SAHARAN AFRICA				
Angola	35	35	35	35
Benin	4	5	5	5
Burkina	20	20	20	20
Burundi	8	10	10	10
Cameroon	40	40	40	40
Chad	20	20	20	20
Congo (Brazzaville)	35	35	35	35
Cote d' Ivorie	164	180	180	180
Ethiopia	183	190	200	200
Gabon	20	20	20	20
Ghana	10	5	5	5
Guinea	25	25	25	25
Kenya	441	430	434	440
Madagascar	125	125	125	125
Malawi	175	200	200	200
Mali	20	20	20	20
Mauritius	602	661	648	650
Mozambique	30	35	40	30
Nigeria	53	59	60	75
Reunion	178	200	221	235
Rwanda	5	5	5	5
Senegal	60	60	60	60
Sierra Leone	6	6	7	6
Somalia	35	40	40	40
South Africa	2,289	2,152	2,429	1,840
Swaziland	504	527	515	490
Tanzania	95	112	115	115
Togo	4	5	5	5
Uganda	30	30	30	30
Zaire	60	60	60	60
Zambia	142	133	140	140
Zimbabwe	502	493	348	0
Total	5,920	5,938	6,097	5,161
MIDDLE EAST				
Iran	600	700	750	750
Iraq	10	10	5	5
Lebanon	6	6	6	8
Syria	41	43	50	50
Turkey	1,380	1,944	1,900	1,820
Total	2,037	2,703	2,711	2,633

FOOTNOTES AT END OF TABLE

MAY 1992

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 9 (Continued)
WORLD CENTRIFUGAL SUGAR PRODUCTION 1/
(1,000 Metric tons)

	1989/90	1990/91	1991/92	1992/93 3/
OTHER ASIA				
Afghanistan	10	10	10	10
Bangladesh	196	262	240	240
Burma	35	25	30	30
China	5,618	6,648	7,000	7,600
India 8/	12,575	13,748	14,650	14,750
Indonesia	2,080	2,120	2,200	2,100
Japan	988	922	990	915
Malaysia	105	95	100	100
Nepal	35	40	45	45
Pakistan	1,987	2,067	2,280	2,330
Philippines	1,750	1,718	1,850	1,875
Sri Lanka	35	35	35	35
Taiwan	511	409	500	520
Thailand	3,502	3,954	5,000	5,000
Vietnam	450	500	500	550
Total	29,877	32,553	35,430	36,100
OCEANIA				
Australia	3,797	3,637	3,180	3,500
Fiji	461	420	420	420
Papua New Guinea	35	45	50	50
Total	4,293	4,102	3,650	3,970
WORLD TOTAL	108,727	113,485	112,485	113,239

1/ One-half of the crop years are on a September/August basis. Crop years for Southern Hemisphere countries begin prior to September. Factors for converting from refined to raw sugar are 1.087 for refined beet sugar and 1.07 for refined cane sugar.

2/ Preliminary. Revised U.S. production estimates will be released on May 29, 1992.

3/ Forecast.

4/ United States data include continental beet and cane and Hawaii cane sugar, but exclude Puerto Rico cane sugar which is listed separately.

5/ French data exclude production of cane sugar in Guadeloupe, Martinique, and Reunion which are listed separately.

6/ FSU-12 includes the 12 newly independent states of the former USSR.

7/ Includes Estonia, Latvia, and Lithuania.

8/ Indian data include production of Khandsari sugar, a native type, semi-white centrifugal sugar. Estimated output of Khandsari sugar in million tons is as follows: 1989/90 - .818; 1990/91 - .859; 1991/92 - 1.035; 1992/93 - .828.

Sugar production from sugarbeets for 1992/93 is forecast at 38.4 million tons, up 2 percent from 37.5 million produced in 1991/92, but 7 percent less than the 1990/91 record of 41.3 million. The expected increase in sugar production is based on a projected 1-percent increase in harvested area, to 8.6 million hectares, and a 2-percent improvement in recovery rates. The European Community (EC) accounts for 42 percent of the world's total sugar production from sugarbeets. EC sugar output for 1992/93 is forecast at 16.0 million tons, an increase of 1 percent from last year. In the 12 newly independent states of the former Soviet Union (excluding the Baltic States), the production forecast of 6.8 million tons is up 1 percent from the volume produced last season. China's 1992/93 forecast of 2.0 million tons is up 33 percent from a year ago and, if realized, will be the largest increase among all the major sugarbeet growing countries. In Poland, the 1992/93 forecast of 1.5 million tons is down 9 percent from last year and 32 percent less than the record 2.2 million ton outturn in 1990/91.

The European Community (EC) accounts for 14 percent of the world's total sugar production and 42 percent of the sugar produced from sugarbeets. The EC 1992/93 beet area is forecast to increase 1 percent, to 2.0 million hectares. In France, the largest producer in the EC, the 1992/93 area forecast is up 3 percent from last year, but 1 percent below the 1990/91 record. However, sugar outturn is forecast at virtually the same tonnage as a year ago because of lower-than-expected yields and a return to more normal recovery rates. The depressed situation of the world sugar market is the principal reason for the downturn in sugar production.

In Germany, the 1992/93 area forecast is down 3 percent from last year. Improvements in production techniques coupled with production per hectare increases averaging 1.5 percent per year, will necessitate a reduction in sugarbeet area in order to keep sugar output within the limits of the sugar quota. Reductions are taking place mainly in eastern Germany where only 166,381 hectares will be planted to sugarbeets in 1992/93 compared with 201,337 hectares in 1991/92. In order to keep the sugar industry within the quota limits, the ultimate planting goal in eastern Germany is about 140,000 hectares. In western Germany, the planting density for beets has risen over the past 20 years from approximately 62,000 plants per hectare in 1970 to 79,000 plants per hectare in 1991. The sugar industry advises farmers to opt for planting densities of 80,000 to 90,000 plants per hectare. Sugarbeet breeding is closely coordinated between breeding companies and sugar refiners, who make recommendations to farmers regarding seed varieties. However, the farmer still makes the final decision about which of the 26 registered varieties will be planted.

In Italy, the 1992/93 area forecast is up 6 percent, or 16,000 hectares, from last year. The expected increase in area stems from sugar production shortfalls with respect to Italy's quota. Thus, sugar outturn for 1992/93 is expected to approach or exceed the level of the country's quota. Favorable weather at planting in March bodes well for the 1992/93 season. Germination rates and stand establishments have been good in all regions. During the period 1985 to 1989, average yields grew by a modest 1.2 percent compared to 12 percent in other EC countries. Factors accounting for the low Italian sugar yields are: less favorable climatic conditions because the amount of rainfall in Italy is less than in other EC producing countries and it is concentrated within a shorter time period; a plant cycle that is shorter than in northern

Europe which prevents the plant from producing as much sugar; a high incidence of parasitic fungi that reduce the sugar content; and, the Italian soils which tend to have more clay and thus become easily water-logged making it necessary for farmers to complete harvesting before the fall rains commence on or about October 1.

In the 12 newly independent states of the former Soviet Union (FSU-12), the 1992/93 harvested area forecast is expected to be slightly lower than last year. The variable inputs necessary for a successful beet harvest are not in place. The distribution of petroleum and other natural resources has been disrupted, with predictable consequences. Despite a somewhat pessimistic outlook for the 1992/93 beet harvest, crop conditions seem favorable in terms of soil moisture.

In Poland, the 1992/93 area forecast of 340,000 hectares is 6 percent less than last year. Although yields are expected to be up 3 percent from 1991/92, the recovery rate is expected to be down 6 percent near the average of the past two seasons. Unattractive producer prices are the reason for the expected decline in area. Even with a sharp draw-down in stocks, the 1.5 million ton sugar outturn is viewed as insufficient to service domestic needs. Prices at all levels have been decontrolled since 1990 and Poland's sugar industry continues to move slowly towards privatization. The Agriculture Market Agency has allocated US\$24.0 million to help stabilize prices through intervention buying, but has abandoned costly export subsidies.

In China, 1992/93 sugarbeet area is forecast at 0.8 million hectares, 7 percent above last year. Raw material is expected to be 20 percent above last year's flood-damaged crop. Because only 20 percent of beet and cane fields are irrigated, weather remains the dominant factor affecting production. China is trying to expand sugar production gradually in the economically less-developed regions, where the land is generally poor and lacks sufficient soil moisture. Most of China's investments in the sugar industry are designed to improve irrigation systems and crop management, reclaim wastelands, expand production capacity, and ensure a stable supply of fertilizers. The Government's policy of gradually eliminating controls on sugar prices means many of these investments will have to be underwritten by the sugar mills and individual farmers. China's sugarbeet yields during the 1980's averaged 16.0 tons per hectare. In 1992/93, beet yields are expected to average about 22.5 tons per hectare. Because of improved varieties, better crop management, and the widespread use of higher quality inputs, beet area has more than doubled in China's northwestern provinces. In Xinjiang, officials estimate that, from 1990/91 to 1991/92, yields increased 25 to 30 percent. The increase was attributed to changes in beet varieties, higher planting densities, improved irrigation methods, and an increase in the survival rate of young plants--from 60 to 80 percent--because the seedlings were protected by paper bags until transplanted. Extraction rates also have improved.

In Turkey, the 1992/93 area forecast is unchanged from last season. Yield per acre is expected to return to a more normal level resulting in a 4-percent decline in sugar production. The State Sugar Corporation of Turkey encourages farmers to increase sugar production for both domestic consumption and for export. Farmers are motivated to plant more beets because of support prices and other incentives. The State Sugar Corporation buys the entire beet crop from farmers at predetermined support prices. Farmers bring their beets to the purchasing centers of each plant in their region. The beets are then hauled to factories for storage and processing. There are 27 sugar factories in Turkey, of which 22 are wholly owned by the State Sugar Corporation. The other 5 processing plants are owned by public and private banks and other state institutions. A regional boundary is established for each factory. Farmers who have land within any of these regions apply to the factory officials for permission to grow sugarbeets. Contracts signed between farmers and factory authorities specify the acreage to be planted, the kind of seed to be used, the type of crop rotation, and other technical and legal aspects. The support price paid depends upon the beet requirements of the State Sugar Corporation, production costs, and the farmers' willingness to grow beets. Farmers are free to switch to other crops and not sign contracts with the corporation.

Franklin Hokana (202) 720-0875

TABLE 10

SUGARBEET AREA, YIELD, AND PRODUCTION
World and Selected Countries 1/

COUNTRY/YEAR	AREA HARVESTED	BEET YIELD	SUGARBEET PRODUCTION	RAW SUGAR	RECOVERY RATE	SUGAR YIELD
	1,000 Ha	MT/Ha	1,000 MT	1,000 MT	Percent	MT/Ha
Austria						
1990/91	50	49.9	2,494	451	18.1	9.02
1991/92	51	49.5	2,522	466	18.5	9.14
1992/93 MAY	54	52.8	2,850	500	17.5	9.26
Belgium-Luxembourg						
1990/91	112	61.2	6,857	1,116	16.3	9.96
1991/92	106	57.0	6,043	967	16.0	9.12
1992/93 MAY	105	57.1	6,000	960	16.0	9.14
China						
1990/91	670	21.7	14,526	1,387	9.5	2.07
1991/92	750	20.0	15,000	1,500	10.0	2.00
1992/93 MAY	800	22.5	18,000	2,000	11.1	2.50
Czechoslovakia						
1990/91	170	31.2	5,308	700	13.2	4.12
1991/92	168	34.9	5,857	780	13.3	4.64
1992/93 MAY	170	35.3	6,000	800	13.3	4.71
Denmark						
1990/91	66	55.8	3,685	591	16.0	8.95
1991/92	65	200.4	13,027	508	3.9	7.82
1992/93 MAY	65	50.8	3,300	500	15.2	7.69
France						
1990/91	474	53.8	25,520	4,736	18.6	9.99
1991/92	453	53.6	24,282	4,423	18.2	9.76
1992/93 MAY	468	53.0	24,800	4,400	17.7	9.40
Germany						
1990/91	620	49.0	30,366	4,672	15.4	7.54
1991/92	574	45.2	25,926	4,245	16.4	7.40
1992/93 MAY	557	48.5	27,000	4,300	15.9	7.72
Hungary						
1990/91	115	38.3	4,400	550	12.5	4.78
1991/92	115	43.5	5,000	700	14.0	6.09
1992/93 MAY	115	43.5	5,000	600	12.0	5.22
Italy						
1990/91	270	43.0	11,600	1,587	13.7	5.88
1991/92	274	41.6	11,400	1,640	14.4	5.99
1992/93 MAY	290	43.1	12,500	1,750	14.0	6.03
Japan 2/						
1990/91	72	55.5	3,994	700	17.5	9.72
1991/92	72	57.2	4,115	780	19.0	10.83
1992/93 MAY	72	54.0	3,890	685	17.6	9.51
Netherlands						
1990/91	125	69.7	8,707	1,341	15.4	10.73
1991/92	123	58.5	7,200	1,137	15.8	9.24
1992/93 MAY	123	56.9	7,000	1,150	16.4	9.35
Poland						
1990/91	440	38.0	16,721	2,214	13.2	5.03
1991/92	361	31.6	11,412	1,642	14.4	4.55
1992/93 MAY	340	32.4	11,000	1,500	13.6	4.41

FOOTNOTES AT END OF TABLE

MAY 1992

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 10 (Continued)

SUGARBEET AREA, YIELD, AND PRODUCTION
World and Selected Countries 1/

COUNTRY/YEAR	AREA HARVESTED	BEET YIELD	SUGARBEET PRODUCTION	RAW SUGAR	RECOVERY RATE	SUGAR YIELD
	1,000 Ha	MT/Ha	1,000 MT	1,000 MT	Percent	MT/Ha
Romania						
1990/91	163	19.1	3,114	334	10.7	2.05
1991/92	202	22.4	4,516	430	9.5	2.13
1992/93 MAY	220	23.2	5,110	500	9.8	2.27
Spain						
1990/91	160	45.4	7,265	1,020	14.0	6.38
1991/92	150	44.7	6,710	1,009	15.0	6.73
1992/93 MAY	150	45.3	6,800	1,025	15.1	6.83
Turkey						
1990/91	378	37.0	13,986	1,944	13.9	5.14
1991/92	398	38.9	15,500	1,900	12.3	4.77
1992/93 MAY	398	37.2	14,800	1,820	12.3	4.57
FSU-12 3/						
1990/91	3,239	24.8	80,379	9,043	11.3	2.79
1991/92	3,113	20.9	64,980	6,725	10.3	2.16
1992/93 MAY	3,100	22.6	70,000	6,800	9.7	2.19
Baltics 4/						
1990/91	47	28.7	1,351	117	8.7	2.49
1991/92	42	33.3	1,400	125	8.9	2.98
1992/93 MAY	42	33.3	1,400	125	8.9	2.98
United Kingdom						
1990/91	192	41.7	8,000	1,360	17.0	7.08
1991/92	170	46.2	7,850	1,330	16.9	7.82
1992/93 MAY	172	46.5	8,000	1,350	16.9	7.85
United States 2/						
1990/91	557	44.8	24,959	3,497	14.0	6.28
1991/92	562	45.0	25,263	3,402	13.5	6.05
1992/93 MAY	574	44.4	25,492	3,674	14.4	6.40
Yugoslavia						
1990/91	158	37.4	5,915	885	15.0	5.60
1991/92	139	44.7	6,219	850	13.7	6.12
1992/93 MAY	158	40.2	6,350	900	14.2	5.70
MAJOR BEET PRODUCERS						
1990/91	8,078	34.6	279,147	38,245	13.7	4.73
1991/92	7,888	33.5	264,222	34,559	13.1	4.38
1992/93 MAY	7,973	33.3	265,292	35,339	13.3	4.43
OTHERS						
1990/91	599	39.6	23,732	3,075	13.0	5.13
1991/92	586	38.2	22,397	2,899	12.9	4.95
1992/93 MAY	600	39.5	23,684	3,023	12.8	5.04
WORLD						
1990/91	8,677	34.9	302,879	41,320	13.6	4.76
1991/92	8,474	33.8	286,619	37,458	13.1	4.42
1992/93 MAY	8,573	33.7	288,976	38,362	13.3	4.47

1/ Refined beet sugar is converted to raw value by a forecast of 1.087.

2/ Produces cane sugar as well as beet sugar.

3/ FSU-12 includes the 12 newly independent states of the former USSR.

4/ Includes Estonia, Latvia, and Lithuania.

CANE SUGAR PRODUCTION IN SELECTED COUNTRIES

Sugar production from sugarcane during the 1992/93 season is forecast at 75.0 million tons, slightly below the 1991/92 record of 75.2 million, but 4 percent above the 72.3 million produced in 1990/91. India is the world's largest sugarcane producer, accounting for 20 percent of the world's total sugar produced from sugarcane. India's cane sugar production (including Khandsari) is forecast at a record 14.8 million tons for 1992/93, 1 percent above the previous high of 14.7 million in 1991/92. In Zimbabwe, usually the fourth largest producing country in Sub-Saharan Africa, no sugar is expected to be produced during the 1992/93 season because of a severe drought.

In India, the forecast for sugarcane area of 2.3 million hectares is up 2 percent from the previous season and is expected to yield 145.0 million tons of raw material for use in centrifugal sugar. The total area under cane cultivation in the major producing states has increased in recent years in response to higher sugarcane prices and profitable returns from the sugar crop. Per hectare yields tend to vary considerably on a state-by-state basis. Most of the cane in Maharashtra is harvested after 15 months, while cane cutting in Uttar Pradesh usually commences 9 to 10 months after planting. If farmers receive delayed or only partial payment from mills for their 1991/92 crop and are forced to harvest ratoon crops when normally they would have replanted, cane yields will be somewhat lower in 1992/93. This pattern of late payment to farmers by mills burdened with large unsold inventories of sugar is expected to confine 1992/93 planting increases to areas near new mills in Maharashtra, Punjab, and Haryana. Defaults by the mills could lead to a cutback in sugarcane production in the future.

Mills producing centrifugal white sugar compete for raw material with producers of khandsari and gur. Gur, a crystallized brown-type sugar, is produced and consumed by the rural population. Khandsari, a native semi-white centrifugal sugar, is popular with Indian consumers because it is somewhat less expensive than milled sugar. Central Government policymakers advocate the gradual elimination of the khandsari sector, arguing that larger mills with recovery rates of about 10 percent should crush the nation's cane, rather than khandsari mills whose recovery rates average 6 percent. Khandsari sugar production goes up in years when refined sugar prices are high because khandsari producers can sell all of their output at market rates, while mills producing refined sugar must sell 45 percent of their output at controlled prices. Khandsari sugar is included in total centrifugal production; gur production is excluded. Total sugarcane area, including that used for Gur production and other uses, is forecast at 3.9 million hectares, up 3 percent from 1991/92.

The 1992/93 Brazilian sugarcane crop is forecast at 75.0 million tons from a harvested area of 1.2 million hectares. Total area planted to sugarcane remains unchanged at 4.3 million hectares. Among annual crops, sugarcane has the longest production cycle--18 months--which constrains the growers' ability to quickly expand or reduce planted area in response to changes in market price levels. The area planted to sugarcane is greatly influenced by alcohol production and consumption policies because approximately two-third's of milled cane is used in the production of ethanol. Currently, Brazil has a fleet of 4.8 million vehicles burning hydrated ethanol. In Brazil, gasoline is mixed with 12 to 14 percent anhydrous ethanol, except in the city of Sao Paulo where gasoline contains 22 percent ethanol. The Association of Ethanol Producers is pressing the Government to extend the use of gasoline with 22 percent ethanol nationwide and increase the production of ethanol-fueled vehicles to 40 percent of total vehicle production.

China's 1992/93 sugarcane area is expected to increase 14 percent, to 1.2 million hectares and yield a record sugarcane crop of 61.0 million tons and total refined sugar output of 5.6 million tons. Continued improvements in crop management, irrigation, and fertilizer distribution coupled with relatively high grower returns, are the principal reasons for China's continued expansion. The following factors are primarily responsible for the expansion in planted area for both sugarbeets and cane: significant increases in procurement prices; implementation of planned area expansion in Xinjiang province in far northwestern China; and, three bumper grain harvests that depressed grain prices and made beets and cane more profitable alternatives. Despite the procurement price increases, cane production in the wealthier, more-developed coastal regions can not begin to compete with revenues from vegetables, fruits, and fish. Cane area is continuing to decline in these regions, while gaining in western Guangdong, Guangxi, and Yunnan. However, the Government's general policy is to increase production through improved yields rather than expanded area.

In Thailand, harvested area for the 1992/93 season is expected to increase 1 percent from 1991/92, to 870,000 hectares. Although cane area has increased in the Central region, it has not kept pace with the rate of expansion in the Lower North and Northeast regions. Several sugar mills have relocated from the Central Plains to the Lower North and Northeast regions because cane production prospects are better and the source of supply more reliable. Many farmers in the North and Northeast have switched from cassava, corn, and soybeans to sugarcane which has proven to be a more profitable crop. The growing period for sugarcane is about 10 to 14 months depending on the variety of cane. Since cane is primarily harvested by hand, there are often labor shortages at harvest time because much of the crop is cut simultaneously. Since 1990, several large cane fields have been developed to facilitate machine harvesting.

In the Philippines, the sugarcane area forecast for 1992/93 is up 3 percent from last season due to the conversion of some rice lands to sugarcane as well as to provide additional raw material to mills opened during 1992. Cane yields also are expected to be above average because of higher input use. The area loss caused by the eruption of Mount Pinatubo reportedly was not as severe as as the early projections indicated and some traditional rice areas which were removed from production due to ash cover were successfully replanted to cane. To meet projected high demand by the year 2000, the The Sugar Regulatory Administration (SRA) expects new areas to be planted to sugarcane in Mindanao, in the Bicol region, and in Negros Oriental. Harvested area would have to increase by at least 35 percent, to roughly 480,000 hectares in the next 8 years, to produce 2.5 million tons of refined sugar to meet domestic and export needs. The SRA expects 1992/93 sugarcane yields to be 5 percent higher than in 1991/92. Higher domestic sugar prices vis-a-vis lower input prices and increased production financing resulted in greater input use. The highest yielding plantation in the Philippines harvests 100 to 120 tons per hectare on sprinkler-irrigated land. Small-scale growers average 45 tons or less. Potential cane yields continue to be severely constrained by the relative dearth of higher-yielding sugarcane varieties available to small and medium-scale growers. The SRA and large milling corporations are striving to overcome this disparity through the Sugarcane Crush Program, a promising venture presently in operation to identify and distribute higher-yielding varieties developed through micro-propagation. This new method, adopted in 1991/92 from Hawaii, reportedly will enable researchers to identify improved varieties within 6 months as opposed to the current 7-year process.

Indonesia's 1992/93 harvested area is expected to decline by 6 percent due to the effects of protracted drought on the ratoon crops mainly in southern East Java. About 135,000 hectares of cane receive irrigation water throughout the year. More than 70 percent of the total sugarcane area is grown on the most fertile land in Java. Most of the cane in Java is cultivated under smallholder management. On the other islands where smallholders account for less than 10 percent of sugarcane area, cane is grown on non-irrigated land of generally low fertility. There is a general policy among government agencies that irrigated cane area in Java will be maintained at about 120,000 to 130,000 hectares in support of Indonesia's effort to become self-sufficient in sugar. At some point in the future, the Government will have to choose between sugar and rice, Indonesia's most important food crop. Another important factor affecting sugarcane production in Indonesia is the development of the sugar industry on islands other than Java. The high costs of relocating sugarcane production to largely unimproved land of low fertility has resulted in relatively slow progress. Selection of cane varieties also will play an important role in attaining self-sufficiency in sugar. Of the 19 cane varieties, more than 65 percent of cane production comes from the Mauririus 445 variety which has a lower sugar content than some of the other varieties grown commercially. The Government recently released several high-yielding varieties that are resistant to pests and drought and which are expected to yield higher levels of cane and sugar.

In Mexico, the forecast for 1992/93 sugarcane area is up 2 percent from last year, to 530,000 hectares. This increase reflects additional recovery since the winter freeze in 1989. Even with relatively stable area, sugar production is expected to continue to increase due to substantial gains in cane yield. However, it is unlikely that sugar recovery rates will increase during 1992/93 due to the severe financial problems currently facing the industry. The Mexican sugar industry is still in the process of restructuring, but recent land reforms could have a significant impact on the future of the industry.

The Republic of South Africa's sugarcane area for 1992/93 is expected to increase by 2,000 hectares, less than 1 percent over the previous season. In contrast, raw material production is expected to decline by 18 percent due to drought. Prospects for the 1992/93 season are poor because the summer rainfall season is nearing an end, the rains needed to promote crop growth are no longer expected, and mature cane is no longer being irrigated. The eventual size of the cane crop as well as the final level of sugar production will depend upon the amount of cane that dies prior to cutting, the sucrose content of the remaining cane, and the volume of late-season rainfall.

The number of small farmers growing sugarcane in South Africa has increased from 31,442 in 1990 to about 40,000 in 1992 due to deregulation of the industry and the lifting of quota restrictions on small growers farming less than 30 kilometers from a mill. The proposed opening up of a new cane area and the establishment of a new mill in the Underberg area of the Eastern Transvaal is the most significant expansion project undertaken by the industry in the last 20 years. The new cane area includes 14,000 hectares under irrigation to be developed over the next 2 seasons.

In Australia, sugarcane area is forecast at 358,000 hectares, up 5 percent from 1991/92. Sugarcane is grown between Maclean in northern New South Wales and Mossman in northern Queensland. Recently, there has been renewed interest in developing a sugarcane industry in the Ord River irrigation area in Western Australia. The Australian industry currently is undergoing its first major area expansion in the last decade. Since 1989, existing growers have had the opportunity to expand their land assignments and new growers have entered the industry. The amount of land sown to sugarcane is currently determined by a highly regulated system. The Queensland Sugarcane Prices Board annually sets the maximum amount of sugar that each mill can deliver to the Queensland Sugar Corporation. Each mill has committees, comprised of mill and grower representatives, that determine the assignment of land, i.e. the amount of sugarcane that each farmer can grow in the coming season. Individual farms are mapped out and can only grow cane on land so designated. Each farm has a 15-percent roaming provision which is, in effect, enforced fallowing. If cane is grown on unassigned land, mills are not obligated to accept the surplus production.

Franklin Hokana (202) 720-0875

TABLE 11

SUGARCANE AREA, YIELD, AND PRODUCTION
World and Selected Countries 1/

COUNTRY/YEAR	AREA HARVESTED	CANE YIELD	SUGARCANE PRODUCTION	RAW SUGAR	RECOVERY RATE	SUGAR YIELD
	1,000 Ha	MT/Ha	1,000 MT	1,000 MT	Percent	MT/Ha
Argentina						
1990/91	265	47.2	12,520	1,300	10.4	4.91
1991/92	280	51.1	14,320	1,570	11.0	5.61
1992/93 MAY	275	50.9	14,000	1,500	10.7	5.45
Australia						
1990/91	339	74.2	25,140	3,637	14.5	10.73
1991/92	341	62.5	21,300	3,180	14.9	9.33
1992/93 MAY	358	69.8	25,000	3,500	14.0	9.78
Brazil						
1990/91	1,170	64.1	75,000	7,900	10.5	6.75
1991/92	1,220	61.5	75,000	9,133	12.2	7.49
1992/93 MAY	1,220	61.5	75,000	9,100	12.1	7.46
China 2/						
1990/91	1,009	57.1	57,620	5,261	9.1	5.21
1991/92	1,050	55.2	58,000	5,500	9.5	5.24
1992/93 MAY	1,200	50.8	61,000	5,600	9.2	4.67
Colombia						
1990/91	117	122.9	14,375	1,595	11.1	13.63
1991/92	119	122.3	14,550	1,653	11.4	13.89
1992/93 MAY	120	122.5	14,700	1,690	11.5	14.08
Cuba						
1990/91	1,350	50.0	67,500	7,620	11.3	5.64
1991/92	1,200	45.0	54,000	6,000	11.1	5.00
1992/93 MAY	1,200	45.0	54,000	6,000	11.1	5.00
Dominican Republic						
1990/91	210	32.6	6,845	580	8.5	2.76
1991/92	212	32.5	6,900	600	8.7	2.83
1992/93 MAY	212	32.5	6,900	625	9.1	2.95
Egypt 2/						
1990/91	90	97.8	8,800	891	10.1	9.90
1991/92	89	93.3	8,300	850	10.2	9.55
1992/93 MAY	87	97.7	8,500	900	10.6	10.34
Fiji						
1990/91	60	67.0	4,020	420	10.4	7.00
1991/92	60	67.0	4,020	420	10.4	7.00
1992/93 MAY	60	67.0	4,020	420	10.4	7.00
Guatemala						
1990/91	120	81.6	9,797	1,015	10.4	8.46
1991/92	125	81.3	10,161	1,149	11.3	9.19
1992/93 MAY	125	84.8	10,600	1,200	11.3	9.60

FOOTNOTES AT END OF TABLE

MAY 1992

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 11 (Continued)

SUGARCANE AREA, YIELD, AND PRODUCTION
World and Selected Countries 1/

COUNTRY/YEAR	AREA HARVESTED	CANE YIELD	SUGARCANE PRODUCTION	RAW SUGAR	RECOVERY RATE	SUGAR YIELD
	1,000 Ha	MT/Ha	1,000 MT	1,000 MT	Percent	MT/Ha
India 3/						
1990/91	2,117	64.3	136,119	13,748	10.1	6.49
1991/92	2,200	64.5	142,000	14,650	10.3	6.66
1992/93 MAY	2,250	64.4	145,000	14,750	10.2	6.56
Indonesia						
1990/91	365	76.9	28,074	2,120	7.6	5.81
1991/92	385	73.0	28,100	2,200	7.8	5.71
1992/93 MAY	360	72.2	26,000	2,100	8.1	5.83
Mauritius						
1990/91	80	75.0	6,000	661	11.0	8.26
1991/92	80	80.0	6,400	648	10.1	8.10
1992/93 MAY	80	81.3	6,500	650	10.0	8.13
Mexico						
1990/91	525	68.6	36,000	3,600	10.0	6.86
1991/92	519	68.0	35,300	3,500	9.9	6.74
1992/93 MAY	530	68.3	36,200	3,620	10.0	6.83
Pakistan						
1990/91	555	40.7	22,600	2,042	9.0	3.68
1991/92	624	39.3	24,500	2,250	9.2	3.61
1992/93 MAY	625	40.8	25,500	2,300	9.0	3.68
Peru						
1990/91	32	130.8	4,186	585	14.0	18.28
1991/92	30	133.3	4,000	500	12.5	16.67
1992/93 MAY	30	133.3	4,000	500	12.5	16.67
Philippines						
1990/91	341	54.5	18,600	1,718	9.2	5.04
1991/92	350	55.7	19,500	1,850	9.5	5.29
1992/93 MAY	360	58.3	21,000	1,875	8.9	5.21
South Africa						
1990/91	265	68.2	18,083	2,152	11.9	8.12
1991/92	276	72.7	20,078	2,429	12.1	8.80
1992/93 MAY	277	59.6	16,500	1,840	11.2	6.64
Sudan						
1990/91	50	100.0	5,000	480	9.6	9.60
1991/92	50	100.0	5,000	500	10.0	10.00
1992/93 MAY	50	100.0	5,000	500	10.0	10.00
Swaziland						
1990/91	36	106.9	3,850	527	13.7	14.64
1991/92	37	106.5	3,941	515	13.1	13.92
1992/93 MAY	37	102.7	3,800	490	12.9	13.24

FOOTNOTES AT END OF TABLE

MAY 1992

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 11 (Continued)

SUGARCANE AREA, YIELD, AND PRODUCTION
World and Selected Countries 1/

COUNTRY/YEAR	AREA HARVESTED	CANE YIELD	SUGARCANE PRODUCTION	RAW SUGAR	RECOVERY RATE	SUGAR YIELD
	1,000 Ha	MT/Ha	1,000 MT	1,000 MT	Percent	MT/Ha
Taiwan						
1990/91	55	76.7	4,219	409	9.7	7.44
1991/92	58	93.1	5,400	500	9.3	8.62
1992/93 MAY	59	88.1	5,200	520	10.0	8.81
Thailand						
1990/91	820	49.5	40,563	3,954	9.7	4.82
1991/92	860	53.5	46,000	5,000	10.9	5.81
1992/93 MAY	870	54.0	47,000	5,000	10.6	5.75
U.S. (Hawaii) 4/						
1990/91	29	204.5	5,931	657	11.1	22.66
1991/92	27	195.0	5,266	680	12.9	25.19
1992/93 MAY	26	212.8	5,534	680	12.3	26.15
U.S. (Mainland) 2/						
1990/91	265	68.3	18,087	2,119	11.7	8.00
1991/92	318	68.9	21,899	2,450	11.2	7.70
1992/93 MAY	328	65.4	21,455	2,450	11.4	7.47
Venezuela						
1990/91	105	62.1	6,519	510	7.8	4.86
1991/92	105	63.8	6,700	540	8.1	5.14
1992/93 MAY	105	65.7	6,900	545	7.9	5.19
Zimbabwe						
1990/91	35	106.6	3,732	493	13.2	14.09
1991/92	20	139.7	2,793	348	12.5	17.40
1992/93 MAY	0	0.0	0	0	0.0	0.00
Major Cane Producers						
1990/91	10,405	61.4	639,180	65,994	10.3	6.34
1991/92	10,635	60.5	643,428	68,615	10.7	6.45
1992/93 MAY	10,844	59.9	649,309	68,355	10.5	6.30
OTHERS						
1990/91	1,210	56.8	68,671	6,288	9.2	5.20
1991/92	1,244	57.3	71,322	6,537	9.2	5.25
1992/93 MAY	1,294	55.6	71,895	6,647	9.2	5.14
WORLD						
1990/91	11,615	60.9	707,851	72,282	10.2	6.22
1991/92	11,879	60.2	714,750	75,152	10.5	6.33
1992/93 MAY	12,138	59.4	721,204	75,002	10.4	6.18

1/ Refined cane sugar is converted to raw value by a factor of 1.07.

2/ Produces beet sugar as well as cane sugar.

3/ Includes Khandsari (native type semi-white centrifugal sugar).

4/ Hawaiian cane is harvested once every 24 months. Consequently, yields per hectare are much higher than in countries where cane is harvested every year.

MAY 1992

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

WORLD FLAXSEED PRODUCTION

World flaxseed production for 1991/92 is estimated at 2.1 million tons, down 183,000 tons or 8 percent from 1990/91. Just 4 countries account for 76 percent of total world flaxseed output. These include Canada, Argentina, India, and the former Soviet Union. Last year's crop was down due to reduced area in two major producers, Canada and Argentina, which together harvested 364,000 tons fewer than in 1990/91. This decline was offset somewhat by the United Kingdom and the United States which increased production by 150 percent and 60 percent, respectively.

Flaxseed Production By Major Producers 1975/76 and 1991/92

Country	----- 1975/76 -----		----- 1991/92 -----	
	Production	Percent	Production	Percent
	(1,000 Metric tons)			
Canada	445	18.1	691	33.0
Argentina	377	15.3	360	17.2
India	598	24.3	350	16.7
EC-12	45	1.8	218	10.4
Former USSR	340	13.8	180	8.6
United States	395	16.1	155	7.4
Others	257	10.6	138	6.7
=====				
Total	2,457	100.0	2,092	100.0

CANADA: Canadian flaxseed production in 1991 (1991/92 crop) is estimated at 691,000 tons, down 244,000 or 26 percent from last year. More than any other country, Canada experiences significant swings in year-to-year flaxseed production. Producers are fortunate to have alternative crops such as wheat and rapeseed to plant in response to market prices. The 1991 flaxseed harvest reflected a down turn in area resulting from rotation requirements and better price prospects in rapeseed. However, good growing conditions resulted in the best average flaxseed yield since 1986. As shown in the table above, Canada produced 33 percent of the world's flaxseed in 1991/92, a sizable decline from last year's 41 percent share. Official Canadian estimates project 1992 flaxseed area (1992/93 crop) down 25 percent.

ARGENTINA: Argentina, the world's second largest flaxseed producer, harvested an estimated 360,000 tons in 1991/92, down 25 percent from a year ago and down for the second consecutive year. After two years of excellent yields and strong international prices, Argentine producers in 1990/91 suffered a combination of poor weather and a 50-percent drop in international prices. As a result, farmers lowered 1991/92 flax area to an estimated 420,000 hectares, down 27 percent. Flaxseed area and production have been trending downward at a very modest rate in Argentina. Flaxseed prices, so far this year, have continued near or below US\$200 (Rotterdam) per metric ton. This is the lowest price in over 10 years and will not encourage farmers to plant additional flax area in 1992/93.

INDIA: Flaxseed production in India in 1991/92 is estimated at 350,000 tons, up slightly from last year. Flaxseed has slowly trended downward in India as farmers switch to more profitable, high-yielding alternative crops, such as new varieties of cereals. Flaxseed's main domestic demand comes from the industrial sector for linseed oil, although nearly 20-percent of linseed oil is consumed as a food product. Nearly all linseed meal is used as an animal feed protein source, particularly as a compound feed additive for cattle. Two-thirds of India's flaxseed is grown in the Provinces of Madhya Pradesh and Uttar Pradesh. Other important Provinces include Maharashtra and Bihar. Most of the flaxseed is produced as a companion crop to paddy rice (referred to as a paira or utera flaxseed crop system). The crop uses residual moisture during the rabi (winter) season in which the seed is broadcast in the standing kharif (summer) rice paddy fields; sowing is best during rice flowering or dough stages. Under this system, little or no management practices are followed. This is a major constraint to higher flaxseed productivity. No significant increase in flaxseed area or production is projected for the near future as domestic supplies fully satisfy industrial linseed oil demand.

THE FORMER USSR: The 1991/92 flaxseed crop is estimated at 180,000 tons, slightly above last year's output of 160,000 tons. Yield was close to the 5-year average, up somewhat from 1990/91. This estimate includes only flaxseed produced for oil and meal uses. A much larger area under flax production is harvested for the garment industry's need for linen. In the next few years, flax production will not change dramatically, but with the new economic freedom to produce and price consumer-goods at competitive prices, the demand for linen, and therefore flax, has positive potential. The following table illustrates the level of estimated flaxseed production by the newly independent states of the former Soviet Union.

Flaxseed Production in the Former USSR
by State for 1991/92

Country	Production (1,000 Metric tons)	Percent
Russia	88	48.9
Ukraine	43	23.9
Belarus	32	17.8
Others	17	9.4
=====		
Total	180	100.0

THE EUROPEAN COMMUNITY: The countries that comprise the European Community (EC-12) have increased the total output of flaxseed from just 45,000 tons 5 years ago to an estimated 218,000 tons in 1991/92 and nearly double the 120,000 tons produced in 1990/91. At least 6 countries grow flax, including Belgium, France, Italy, Germany, the Netherlands, and the United Kingdom. It is the United Kingdom where the real growth in area and production has occurred. The United Kingdom's flaxseed output has risen steadily, due to a combination of area and yield increases, from 8,000 tons produced in 1986/87 to an estimated 170,000 tons in 1991/92. This is a significant increase over the EC-12's next largest flaxseed producer France, with 22,000 tons. Flaxseed production in the EC-12 likely will increase at a modest rate for 1992/93. Domestic self-sufficiency in flaxseed during 1991/92 (for the seed equivalent of seed, meal, and oil consumption) would be fulfilled with production of about 1.0 million tons. At current yields, this level of output would require an area of approximately 650,000 hectares. This is 490,000 hectares more than the 160,000 hectares harvested in 1991.

Reports from U.S. agricultural counselors stationed at Embassies in the major flaxseed producing countries indicate that plantings and production in 1992/93 will not change significantly from 1991/92. The USDA will release it's initial flaxseed production forecast for 1992/93, along with other oilseed forecasts, in July 1992.

Rod Paschal (202) 720-0881

TABLE 12

World Flaxseed Harvested Area

	76/77	77/78	78/79	79/80	80/81	81/82	82/83	83/84	84/85	85/86	86/87	87/88	88/89	89/90	90/91	91/92 ^f
<i>Units in 1,000 hectares: Countries sorted by largest area in 1991/92.</i>																
India	1,888	2,010	2,092	1,614	1,673	1,820	1,404	1,487	1,395	1,420	1,155	1,151	1,199	1,124	1,148	1,100
Former USSR	1,361	1,362	1,339	1,212	1,266	1,057	1,126	1,173	1,159	1,100	1,053	1,069	1,039	965	850	850
Canada	324	596	526	931	554	466	631	431	720	740	755	591	501	598	725	530
Argentina	674	884	817	978	726	740	864	770	732	688	745	655	535	575	575	420
United States	386	501	278	355	268	234	297	235	218	236	276	187	91	66	102	136
EC-12	57	62	66	61	57	39	51	50	61	77	63	69	82	93	112	160
United Kingdom	--	--	--	--	--	--	--	--	--	9	11	8	14	18	37	100
France	43	46	54	50	46	30	38	39	47	53	41	47	52	56	55	37
Belg-Lux	9	10	7	7	7	6	9	7	10	11	8	10	11	12	12	10
Netherlands	5	6	5	4	4	3	4	4	4	4	3	4	5	6	7	8
Germany	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	4
Italy	5	10	10	7	5	5	1	1	1	1	1	1	1	1	1	1
Romania	85	80	75	84	82	83	80	75	50	77	75	75	70	79	50	43
Bangladesh	15	15	15	15	15	15	15	15	15	15	15	75	66	71	70	70
Czechoslovakia	30	33	33	30	31	29	28	30	31	30	30	30	30	30	30	30
Egypt	25	25	25	29	22	16	32	13	12	18	15	15	15	17	13	15
Poland	87	62	84	101	82	59	48	44	43	39	30	28	30	30	30	10
Pakistan	8	10	13	10	11	11	8	9	9	10	10	10	10	10	10	10
Turkey	12	9	5	8	9	8	2	5	8	10	7	8	8	8	8	8
Hungary	19	20	20	15	9	9	9	9	9	6	6	6	6	6	6	6
Australia	15	44	13	17	10	7	5	5	6	10	8	8	3	2	4	6
Uruguay	74	79	61	98	36	10	13	13	10	8	4	1	4	4	4	4
Iran	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
Mexico	12	12	11	8	6	10	1	9	9	3	3	3	3	3	3	3
World Total	5,080	5,817	5,486	5,576	4,865	4,621	4,618	4,377	4,491	4,491	4,254	3,985	3,696	3,684	3,743	3,404

Note: (f) denotes preliminary estimate or forecast.

May 1992

Production Estimates & Crop Assessment Division, FAS, USDA

TABLE 13

World Flaxseed Yields

	76/77	77/78	78/79	79/80	80/81	81/82	82/83	83/84	84/85	85/86	86/87	87/88	88/89	89/90	90/91	91/92 ^f
<i>Units in metric tons per hectare</i>																
Argentina	0.92	0.92	0.73	0.76	0.84	0.81	0.89	0.86	0.86	0.67	0.84	0.82	0.86	0.90	0.84	0.86
Australia	1.13	0.64	1.00	0.82	0.70	0.86	0.60	0.80	1.00	1.20	1.13	1.00	2.33	1.00	1.50	1.00
Bangladesh	0.47	0.47	0.47	0.47	0.47	0.53	0.53	0.53	0.53	0.53	0.53	0.53	0.55	0.54	0.57	0.57
Belg-Lux	0.89	0.70	1.00	1.00	0.86	0.83	0.78	0.86	0.80	0.73	0.75	0.80	0.73	0.58	0.67	0.80
Canada	0.86	1.10	1.09	0.88	0.80	1.00	1.19	1.03	0.96	1.22	1.36	1.23	0.75	0.83	1.29	1.30
Czechoslovakia	0.33	0.33	0.30	0.40	0.48	0.41	0.54	0.50	0.48	0.50	0.50	0.50	0.50	0.50	0.50	0.50
Egypt	1.20	1.20	1.24	1.17	1.23	1.13	1.19	1.23	1.67	1.22	1.27	1.27	1.27	1.35	1.39	1.33
France	0.84	0.94	0.57	0.84	0.76	0.60	0.82	0.56	0.62	0.64	0.59	0.47	0.60	0.54	0.64	0.60
Germany	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	2.00
Hungary	0.90	0.45	0.60	0.60	1.11	1.22	1.22	1.22	1.00	1.17	1.00	1.17	1.17	1.17	1.17	1.17
India	0.22	0.26	0.26	0.17	0.25	0.27	0.27	0.30	0.28	0.27	0.27	0.34	0.30	0.29	0.30	0.32
Iran	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Italy	0.80	0.60	0.30	0.43	0.60	0.60	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Mexico	0.67	1.50	1.36	1.25	1.33	1.20	1.00	1.11	1.11	1.33	1.00	1.00	1.00	1.00	1.00	1.00
Netherlands	1.00	1.00	1.00	1.00	1.00	1.33	1.00	0.75	1.00	1.00	1.67	1.25	1.00	1.17	1.14	1.13
Pakistan	0.50	0.60	0.54	0.60	0.64	0.64	0.75	0.56	0.56	0.60	0.60	0.60	0.60	0.60	0.60	0.60
Poland	0.56	0.61	0.62	0.35	0.35	0.41	0.35	0.43	0.42	0.46	0.50	0.39	0.50	0.37	0.37	0.20
Romania	0.59	0.53	0.81	0.56	0.54	0.46	0.54	0.31	0.70	0.47	0.43	0.44	0.43	0.62	0.56	0.61
Former USSR	0.25	0.22	0.19	0.21	0.16	0.16	0.13	0.22	0.21	0.18	0.22	0.21	0.21	0.50	0.50	0.50
Turkey	0.58	0.67	0.60	0.38	0.33	0.25	0.50	0.40	0.38	0.50	0.57	0.50	0.50	0.24	0.19	0.21
United Kingdom	--	--	--	--	--	--	--	--	--	0.78	0.73	1.25	1.86	1.67	1.84	1.70
United States	0.50	0.73	0.79	0.86	0.73	0.79	0.88	0.75	0.82	0.89	1.06	1.01	0.45	0.47	0.95	1.14
Uruguay	0.62	0.51	0.51	0.66	0.58	0.60	0.69	0.69	0.70	0.75	0.75	1.00	0.75	0.75	0.75	0.75
World Average	0.42	0.51	0.45	0.48	0.43	0.45	0.54	0.49	0.52	0.52	0.62	0.57	0.45	0.50	0.61	0.61

Note: (f) denotes preliminary estimate or forecast.

TABLE 14

World Flaxseed Production

	76/77	77/78	78/79	79/80	80/81	81/82	82/83	83/84	84/85	85/86	86/87	87/88	88/89	89/90	90/91	91/92
<i>Units in 1,000 metric tons: Countries sorted by largest production in 1991/92.</i>																
Canada	277	653	572	815	442	468	752	444	694	902	1,026	729	373	498	935	691
Argentina	617	810	600	743	610	600	765	660	626	460	622	535	460	516	480	360
India	419	527	535	269	423	483	375	444	389	380	317	393	361	326	339	350
Former USSR	337	300	250	254	196	165	150	259	248	201	233	228	220	227	160	180
United States	193	363	219	305	196	185	261	175	178	211	293	189	41	31	97	155
EC-12	49	56	43	53	45	27	42	31	41	53	43	45	70	75	120	218
United Kingdom	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--
France	36	43	31	42	35	18	31	22	29	7	8	10	26	30	68	170
Netherlands	5	6	5	4	4	4	4	3	4	4	5	5	5	7	8	9
Belg-Lux	8	7	7	7	6	5	7	6	8	8	6	8	8	7	8	8
Germany	--	--	--	--	--	--	--	--	--	--	--	--	--	--	--	8
Italy	4	6	3	3	3	3	1	1	1	1	1	1	1	1	1	1
Bangladesh	7	7	7	7	7	8	8	8	8	8	8	40	36	38	40	40
Romania	50	42	61	47	44	38	43	23	35	36	32	33	30	49	28	26
Egypt	30	30	31	34	27	18	38	16	20	22	19	19	19	23	18	20
Czechoslovakia	10	11	10	12	15	12	15	15	15	15	15	15	15	15	15	15
Hungary	17	9	12	9	10	11	11	11	9	7	6	7	7	7	7	7
Australia	17	28	13	14	7	6	3	4	6	12	9	8	7	2	6	6
Pakistan	4	6	7	6	7	7	6	5	5	6	6	6	6	6	6	6
Poland	49	38	52	35	29	24	17	19	18	18	15	11	15	11	11	5
Turkey	7	6	3	3	3	2	1	2	3	5	4	4	4	4	4	4
Mexico	8	18	15	10	8	12	1	10	10	4	3	3	3	3	3	3
Uruguay	46	40	31	65	21	6	9	9	7	6	3	1	3	3	3	3
Iran	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3	3
World Total	2,144	2,953	2,467	2,687	2,096	2,078	2,501	2,139	2,316	2,350	2,658	2,270	1,674	1,837	2,275	2,092

Note: (f) denotes preliminary estimate or forecast.

May 1992

Production Estimates & Crop Assessment Division, FAS, USDA

Important factors that influence world cotton production include the current cotton market situation, domestic and world economic conditions, government policies, and weather. Of these factors, this season's lower world cotton prices, which are associated with relatively high stock/use ratios, are providing the biggest downward stimulus for influencing next season's cotton output.

Preliminary indications are that world cotton production for 1992/93 will drop to 94.0 million bales, 1 percent below this year's record harvest. Harvested area also is expected to fall slightly below this year's level. Foreign production is predicted at 76.8 million bales, 1 million below the record produced in 1991/92. The forecast implies that government policies in several major producing countries will support production in the face of lower world cotton prices. This forecast bars catastrophic, weather-related losses and financial problems.

Production in the United States for 1992/93 is projected at 17.2 million bales, down 2 percent from 1991/92. However, the current crop is advanced over last year with fewer of the uncertainties that affected last year's crop. At this time last year, factors affecting the cotton crop included dry soil conditions in West Texas, excessive soil moisture in the Mississippi Delta, and reduced reservoir levels in California. This year, conditions are much more favorable in Texas and the Delta and reservoir levels have improved, but continue to remain low in California.

Government policy in China continues to emphasize the need for large cotton supplies in order to maintain its role as a major exporter of both raw cotton and textiles, while meeting its rapidly rising domestic consumption requirements. The Government indicates that the goal for the eighth, 5-year plan (1991-95) is to produce 21 to 23 million bales per year. China is expected to continue its push to maintain production at a relatively high level in 1992/93. A strong government-supported cotton procurement price, combined with subsidized production inputs, prompted larger plantings in 1991. This emphasis should continue for 1992 with cotton output approximating last year's level. Lower world prices are expected to have little affect on domestic production policies. This spring's dry weather is another plus for the expansion of cotton. China planted less wheat, leaving more land for cotton and other spring planted crops. This could boost area planted to cotton above last year's estimated 6.4 million hectares.

Production in the newly independent states of the former Soviet Union will be affected by 3 opposing forces: the need to earn hard currency, provide more food production, and protect the environment. The strongest argument for area expansion revolves around pressure to earn hard currency by means of cotton exports. The pressure to reduce cotton plantings comes from the newly independent states' need to increase the area dedicated to food and forage crop production. In addition to their food concerns, these states have experienced an increase in land salinity from cotton irrigation. Area is expected to continue its decline from last season's estimated 3.0 million hectares, continuing the trend of the past 4 years.

In Mexico, producers have limited access to production credit since bankers are aware of the cost-price squeeze on the farmer. Defaults on production credit by cotton producers have been higher over the past couple of years than for producers of other agricultural commodities. Bad weather at harvest reduced the quality and price of cotton, thereby placing producers in financial difficulty. This year's low world cotton price, together with high domestic production costs, has given the Mexican farmer little incentive to plant cotton at the same level as last season.

South American cotton plantings for 1992/93, which will begin in about 4 to 5 months, remain uncertain. In Brazil, the largest South American producer, area sown will be influenced by the current season's larger than expected crop, probable competition for area from grain and soybeans, and the level and availability of rural credit. In Argentina, cotton farmers are going through a difficult period financially as domestic cotton prices are lower than the cost of production. Nevertheless, cotton has remained the best alternative in recent years. This situation indicates only minor downward adjustments in area for 1992/93. In Paraguay, the lack of governmental support, weak international cotton prices, and an over-valued local currency have combined to seriously reduce ginning and export margins. This situation has reduced prices ginners are willing to pay producers. If the Government continues its lack of support for production credits and industry forecasts prove correct, i.e. prices are lower at planting time later this year, then 1992/93 plantings are likely to remain near this year's reduced level.

In South Asia and Oceania, cotton production levels will be highly variable in 1992/93. Planting in Pakistan is currently underway in the south. Area intentions for the 1992/93 season are being influenced by this year's lower world cotton prices. However, recent agricultural policy changes, designed to keep land in cotton, will likely offset the effect of lower world prices. In India, current domestic price signals are expected to encourage additional production despite the lower world price. However, prices of many other commodities within India are also rising, precluding a major shift into cotton. Most of the increased output is expected to come from higher yields as compared to last season's drought-affected crop. In Australia, cotton production is likely to be near, to slightly below, this year's drought-reduced level as low world prices influence planting intentions. Due to falling returns, it is likely that the dryland area will decline while plantings in the more profitable irrigated areas will increase.

In Turkey, cotton production is expected to be unchanged or up only slightly from last season. Planting is under way in the Aegean and Antalya regions and nearly complete in Cukurova. Higher cotton plantings are expected for 1992/93 since domestic prices remain higher than world prices despite surplus domestic stocks. The 1992/93 Syrian crop may face the constraint of rising production costs as prices for diesel fuel increases. Diesel prices may increase production costs by as much as 50 percent. However, if the guaranteed procurement price for the 1992/93 cotton crop allows for these increases, production may repeat this year's level. The Syrian Agricultural Council has maintained a policy of promoting continuous increases in cotton production to provide a larger crop for export. This policy traditionally has been implemented through yearly increases in the procurement price for seed cotton. It is not certain if the increased cost of production will be covered by an increase in the procurement price.

The Egyptian Government would like to expand cotton production in 1992/93. The major constraint to increased output continues to be the low government procurement price relative to the world price. Because of the poor returns on investment, Egyptian farmers have focused on the production of alternative commodities. For 1992, the Egyptian Government has pledged to make prices for next season's cotton crop, of all varieties, equivalent to 66 percent of world market rates.

In Greece, the largest EC producer, abundant rains and snow cover this winter should result in enough water supplies for irrigation. Offsetting this, however, is the dry weather that has occurred so far this spring.

NOTE: Information in this article is based on field reports received from U.S. agricultural counselors and attaches, together with input from USDA Washington analysts. Actual production could vary from the estimated world total for a number of reasons, including government policy changes, weather during the crop season, and price changes for cotton and competing crops. The first official USDA individual country forecasts for area, yield, and production will be released on July 9, 1992.

Ronald R. Roberson (202) 720-0879

TABLE 15

World Cotton Area, Yield, and Production			
Year	Harvested Area (1,000 Ha)	Yield (Kg/Ha)	Production (1,000 480-Bales)
1982/83	31,393	477	68,715
1983/84	30,838	465	65,854
1984/85	33,859	571	88,757
1985/86	31,670	553	80,431
1986/87	29,492	521	70,548
1987/88	31,021	569	81,159
1988/89	33,700	547	84,649
1989/90	31,571	551	79,893
1990/91	33,041	573	87,000
Estimate 1991/92	34,264	605	95,176
5-Year Avg.	32,719	569	85,575
Forecast 1992/93			94,000

May 1992

Production Estimates & Crop Assessment Division, FAS, USDA

BULGARIAN GRAIN SITUATION OVERVIEW

The Bulgarian agricultural sector, like the entire economy, is in crisis, according to the U.S. agricultural counselor in Belgrade. The transition to a market economy, which has been vigorously pursued by the Government, has caused serious upheavals. The effect on agriculture has, in many ways, been more pronounced than in other sectors. Crop production costs have been driven up by the removal of most price controls and government subsidies. Agricultural inputs are both scarce and expensive. Importation of farm machinery and agricultural chemicals has dropped precipitously because of low foreign exchange reserves. In addition, the land reform process has yet to begin in Bulgaria. The longer this step is delayed, the greater the uncertainty in rural communities. Therefore, the grain production scenario for the country is deteriorating with 1992/93 total grains output expected to decline by approximately 19 percent, to 7.1 million tons. The following information was provided by the U.S. agricultural counselor.

PRODUCTION OVERVIEW

Total grain production reached 8.8 million tons in 1991/92, up 13 percent from the poor harvest a year earlier. Growing conditions were mixed resulting from variable weather which affected the major crops. The timely end of a 4-year drought in Bulgaria increased overall grain output, despite poor economic conditions and a lack of appropriate crop inputs. Although the 1991/92 winter wheat crop was seriously affected by heavy, harvest rainfall, summer corn yields benefited from the ample moisture. Wheat production declined 12 percent, to 4.5 million tons in 1991/92, while corn output rose 119 percent, to 2.7 million tons. Barley production rose nearly 11 percent, to 1.5 million tons due to a rise in both crop area and yield. Barley yield was less affected by heavy rainfall during the harvest period than wheat.

Grain production in 1992/93 is expected to decline significantly because of deteriorating economic conditions, land reform delays, and a shortage of fertilizers and pesticides. Sown area and crop yields are expected to suffer from the overriding problems in the agricultural economy. Winter grains area is forecast down across-the-board, including wheat, barley, rye, and oats. Poor planting conditions and continuing delays in land reform decreased winter grain area as farmers began focusing less attention on cooperative efforts at State Farms. Wheat production in 1992/93 is estimated at 3.5 million tons, down 1.0 million or 22 percent from last year. Wheat area is estimated to have declined by 17 percent from last year, to 1.0 million hectares. Barley area in 1992/93 is estimated at 0.3 million hectares, a drop of 19-percent from the previous year. Barley output is estimated at 1.2 million tons, or a decline of 20 percent from last year. Rye and oat production are estimated down slightly, to 35,000 and 30,000 tons, respectively. The corn crop is expected to exhibit a less dramatic decline this year as it becomes a favored crop for small farmers. Corn area is expected to increase 7 percent, to 0.6 million hectares in 1992/93, but yields are expected to decline due to lower input use. Corn production in 1992/93 is estimated at 2.3 million tons, down 0.4 million or 15 percent from last year.

PROBLEMS AND POLICY

The limited progress made in implementing land reform in Bulgaria amplifies existing problems in the agricultural sector. Land reform is the most important factor influencing farmers planting decisions and has played a major role in causing a lower winter grain area this year. According to the "Land Law" passed in March 1990, land is to be returned to former owners, and State Cooperatives are to be abolished in two years. To date, only 15 land claimants have come forward and no land titles have been issued. For most potential claimants, the move away from Government-supported State Farms is a frightening prospect. Independent farmers are faced with a crumbling economy, scarce crop inputs, unaffordable credit (near 60% annual interest rate), inoperable or inappropriate farm machinery, no extension services, no marketing news services, and little farm enterprise, decision-making experience. In addition, many land claimants are from urban areas and have no intention of returning to farming. Despite these difficulties, land reform is expected to proceed, albeit slowly, over the next 3 to 5 years.

The Government is reportedly still trying to clarify its agricultural policy, particularly with respect to land reform. Popular sentiment among many members of the National Assembly favors the replacement of large State Farms and Cooperatives with small private farms. The process of evolution to a privately-owned farm economy, however, would require enormous change in the overall economy and social structure. It would entail an unprecedented reverse migration from urban to rural communities, abundant availability of farm equipment appropriate for small land holdings, and a change in crop selection and focus.

In the meantime, a number of State Farms have provisionally distributed land parcels among their members. These newly-independent, small farmers are expected to change their crop rotations to favor corn production over the long term. Individuals taking advantage of the land reform also are expected to follow this pattern, as corn is the preferred grain crop for small producers. Private households can harvest it without machinery, store the ears on the farm, and feed the grain to their own livestock. Therefore, it is an optimal commodity for the rural transformation period. The State Farms had traditionally focused on large-scale wheat cultivation, utilizing cooperative labor and equipment. Wheat production is expected to decline in importance, with the growth of private farms and small-holding agriculture in the country.

CROP INPUTS AND PRICES

During the 1991/92 growing year, all crop inputs were in short supply. Domestic production of agricultural chemicals significantly declined in recent years, with virtually all fertilizer, pesticide, and fuel being imported in 1991/92. Potassium and phosphatic fertilizer imports in 1991/92 declined to 75,200 tons, from a level of 419,000 tons the previous year. Pesticide imports similarly declined from 96,000 tons in 1990/91 to 9,000 tons in 1991/92, a difference of 90 percent. The lack of foreign exchange has led the Ministry of Agriculture to report that no fertilizers or pesticides will be imported for the 1992/93 season. Grain yields are expected to suffer as a consequence. In addition, most farm equipment already in the country is inefficient and poorly maintained. Tractor imports declined by 87 percent in 1991/92, to a level of 400 vehicles. Only 80 combines were imported last year, down from about 1,250 in 1990/91.

In addition to the deteriorating supply and burgeoning cost of crop inputs, farmgate prices for grain were set too low to encourage significant sales. The Government controls farmgate prices through the Ministry of Agriculture and the "State Fund" for grains. Grain sales essentially ceased in August after domestic prices dropped below the level of imported grain prices on the local market. State Farms and Cooperatives simply refused to sell at the government price, and the producers kept the grain on-farm.

Michael J. Shean (202) 690-0135

BULGARIAN GRAINS: Area, Yield, and Production

COMMODITY		AREA (1,000 Ha)	YIELD (Ton/Ha)	PRODUCTION (1,000 Metric Tons)
BARLEY				
	1988/89	345	3.81	1,313
	1989/90	360	4.36	1,568
	1990/91	360	3.74	1,345
	1991/92	383	3.90	1,495
	1992/93	310	3.87	1,200
CORN				
	1988/89	490	3.18	1,557
	1989/90	563	4.30	2,421
	1990/91	400	3.10	1,241
	1991/92	560	4.85	2,718
	1992/93	600	3.83	2,300
MILLET				
	1988/89	1	1.00	1
	1989/90	1	1.00	1
	1990/91	1	1.00	1
	1991/92	1	1.00	1
	1992/93	1	1.00	1
OATS				
	1988/89	27	1.96	53
	1989/90	26	1.73	45
	1990/91	26	1.73	45
	1991/92	26	1.35	35
	1992/93	20	1.50	30
RYE				
	1988/89	30	1.67	50
	1989/90	30	1.50	45
	1990/91	30	1.50	45
	1991/92	30	1.33	40
	1992/93	25	1.40	35
WHEAT				
	1988/89	1,182	4.01	4,743
	1989/90	1,138	4.75	5,402
	1990/91	1,163	4.38	5,095
	1991/92	1,200	3.75	4,500
	1992/93	1,000	3.50	3,500
TOTAL GRAINS				
	1988/89	2,091	3.71	7,767
	1989/90	2,132	4.46	9,512
	1990/91	1,991	3.91	7,792
	1991/92	2,200	3.99	8,789
	1992/93	1,956	3.61	7,066

CHART 1

BULGARIA: Major Grains Area

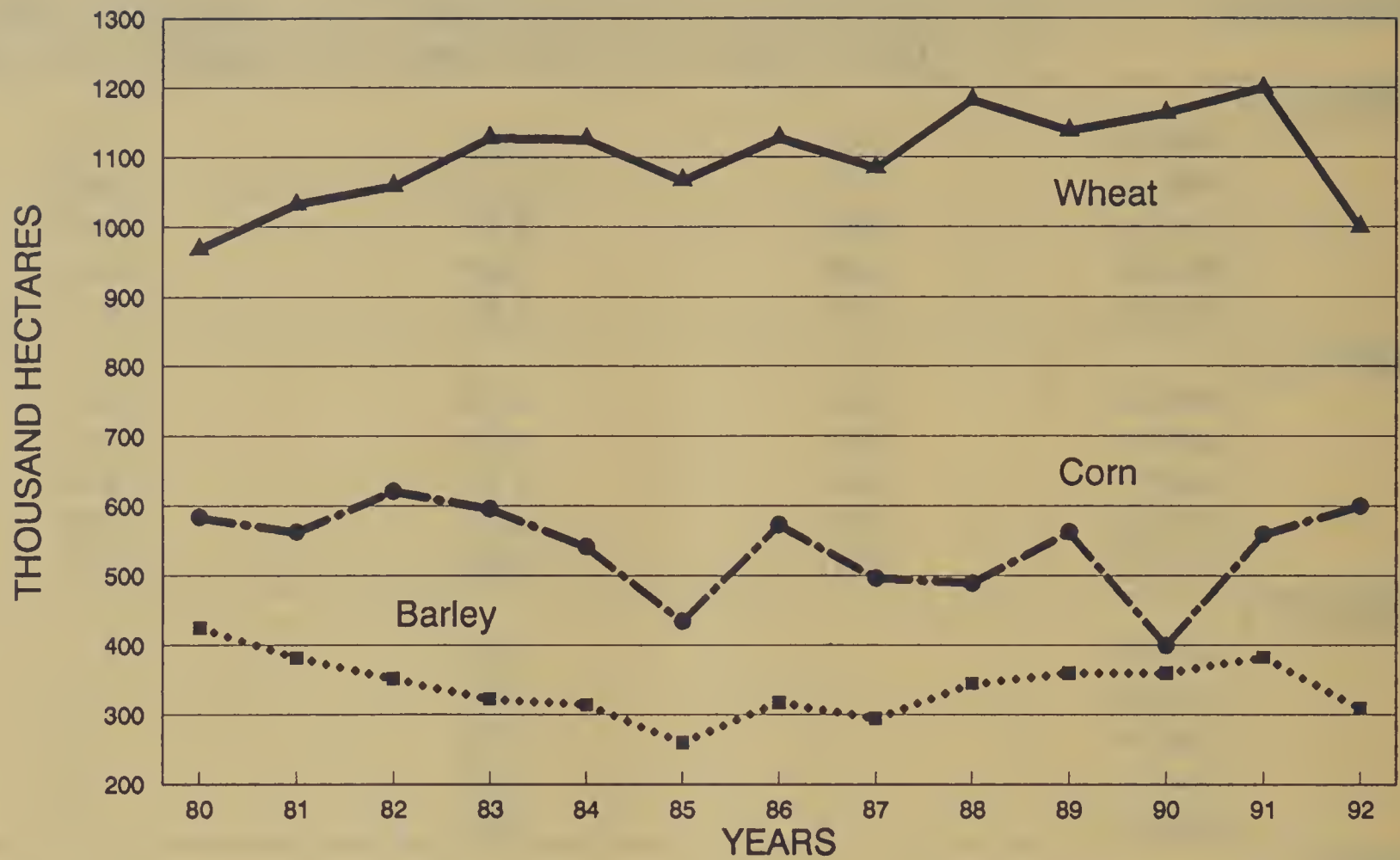
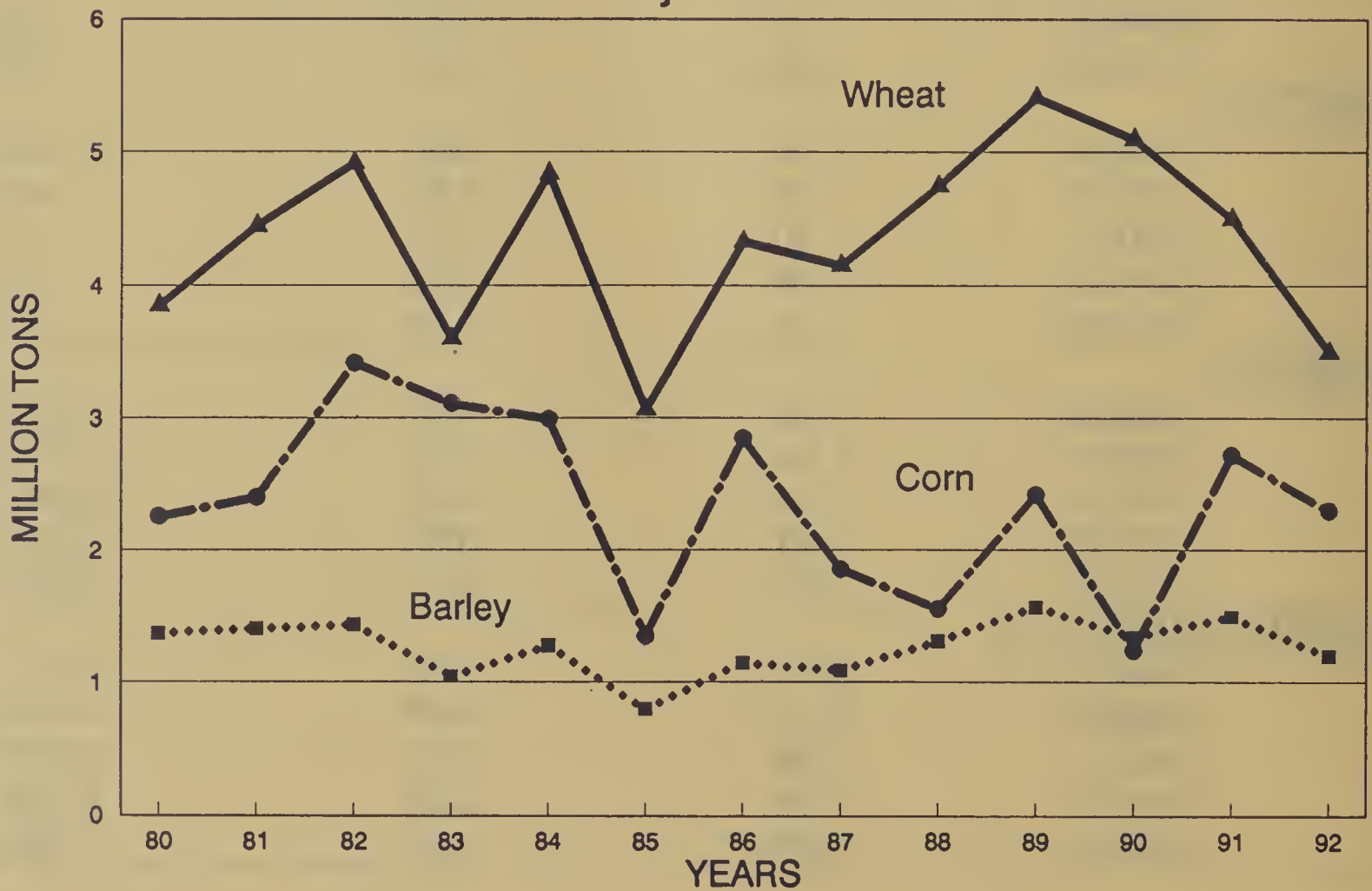


CHART 2

BULGARIA: Major Grains Production



MEXICAN TOMATO PRODUCTION

Mexico's 1991/92 output of fresh market tomatoes is estimated at 1.0 million tons, 24 percent below the December 1991 forecast and 29 percent below last season. Production of tomatoes for processing, estimated at 317,000 tons, is down 21 percent from 1990/91, but up 6 percent from the December estimate. Extremely heavy rains in December, January, and February adversely affected tomato crops throughout Mexico, particularly in the state of Sinaloa where the major producing regions are located. In addition, a larger-than-normal amount of substitution occurred between the fresh market and processing sectors due to harvesting problems and wide price differentials.

MEXICO: FRESH AND PROCESSING TOMATO PRODUCTION

	<u>1988/89</u>	<u>1989/90</u>	<u>1990/91</u>	<u>1991/92</u> 1/	
				<u>Dec 1991</u>	<u>Mar 1992</u>
Fresh					
Area Harvested (1,000 Ha)	66.8	64.0	69.0	64.0	57.0
Production (1,000 MT)	1,348.0	1,279.0	1,400.0	1,320.0	1,000.0
Yield (MT/Ha)	20.2	20.0	20.3	20.6	17.5
Processing					
Area Harvested (1,000 Ha)	7.4	7.8	8.2	6.0	6.5
Production (1,000 MT)	317.0	365.0	400.0	300.0	317.0
Yield (MT/Ha)	42.8	46.8	48.8	50.0	48.8

1/ Preliminary.

FRESH MARKET TOMATOES

Harvested area of tomatoes for the fresh market is estimated at 57,000 hectares for 1991/92, down 12,000 from 1990/91 and 7,000 below the December estimate. Heavy rains prevented some growers from completing their 1991/92 plantings. In addition, the rains and subsequent flooding destroyed approximately 4,000 hectares that already had been planted.

The yield estimate for fresh tomatoes has been reduced from 20.6 tons per hectare to 17.5 tons per hectare, also as a result of the weather. Yields would have been even lower, but some harvesting was completed before the rains began.

Since early March, weather patterns have been relatively normal, allowing for the planting of the summer crop and harvesting of the remaining winter crop. In addition, the quality of tomatoes reaching wholesale markets since the beginning of April has shown some improvement, compared to the poor quality of fresh market tomatoes offered for sale during the first 3 months of 1992.

The steep decline in the 1991/92 crop estimate greatly affected domestic prices for fresh tomatoes. Wholesale prices in Mexico City increased sharply earlier this year, rising from 3,500 pesos per kilogram (US\$0.55 per pound) in the second week of January to 6,300 pesos per kilogram (US\$0.95 per pound) during the second week of March. In late March, retail prices for fresh tomatoes averaged about 12,000 pesos per kilogram (US\$1.80 per pound), but, by the end of April, prices had plummeted to 1,625 pesos per kilogram (US\$0.25 per pound).

Most of Mexico's fresh tomato exports are shipped from January through April. Preliminary assessments indicate that over 40 percent, or 175,000 tons of expected exports, were lost due to the heavy rains during December, January, and February. Some of the tomatoes that normally would have been exported were diverted to the domestic market because the quality did not meet export standards and domestic prices were favorable.

TOMATOES FOR PROCESSING

Output of tomatoes for processing during 1991/92 is estimated at 317,000 tons, down 21 percent from a year ago. The crop of tomatoes destined for processing was not affected as much by the inclement weather as were tomatoes cultivated specifically for fresh market sale. Most of Mexico's processing tomatoes are harvested late in the season and are grown north of Culiacan, near the city of Los Mochis, where the rains were less damaging. Prior to the rains, producers were expected to reduce planted area due to a surplus of tomato paste. Because of the rains, some areas were not planted at all and an estimated 500 hectares already planted were destroyed. The yield estimate for 1991/92, which takes into account the rain damage, has been reduced from the December projection of 50.0 tons per hectare to 48.8 tons per hectare.

Tomato paste production for the 1992/93 season (March/February) is forecast at 47,600 tons, down substantially from the 60,000 produced in 1991/92. The decline primarily is due to low international prices for tomato paste.

Arthur Coffing (202) 720-0885

HARVEST RESULTS FOR 1991 IN THE FORMER SOVIET UNION

Final grain production figures for 1991 for the Commonwealth of Independent States (CIS) has been reported by the State Statistical Committee of the former USSR at 154.7 million tons (clean-weight). (Note: This estimate includes pulses and miscellaneous grains.) The CIS includes 11 of the 15 newly independent states of the former Soviet Union; not included are the Baltics (Lithuania, Latvia, and Estonia) and Georgia. The three major grain-producing states--Russia, Ukraine, and Kazakhstan--all reported significant declines in grain production. The harvest in the Russian Federation fell from 116.7 million tons in 1990 to 89.7 million in 1991. Production in Ukraine dropped 12.4 million tons to 38.6 million, the lowest level since 1983. Grain production fell most dramatically in Kazakhstan, where the harvest reached only 11.9 million tons compared to 28.5 million in 1990. Clean-weight grain production in the Baltic States for 1991 has been estimated at 5.0 million tons and production in Georgia at 0.5 million tons. This brings the combined clean-weight 1991 grain production for the former Soviet Union to approximately 160.2 million tons (including pulses and miscellaneous grains), a 27-percent drop from the 218.3 million harvested in 1990. [The USDA combined estimate of 151.5 million tons for 1991 total grain production in both the Baltics and the remaining 12 former states of the Soviet Union (FSU-12) does not include pulses and miscellaneous grains, which totaled approximately 8.7 million tons.]

Several factors contributed to the decline in 1991 grain production. Unusually wet weather during the autumn of 1990 delayed harvest, which in turn reduced the area sown to higher-yielding winter grains. A crippling drought in Kazakhstan lowered (clean-weight) grain yields from 1.2 tons per hectare in 1990 to 0.5 tons in 1991, a decrease of almost 60 percent. Western areas of the Russian Federation, particularly the Volga Valley, also suffered from a lack of rainfall during the 1991 growing season. Officials stated that cereal crops were left uncut on nearly 7 million hectares of seeded area. Another problem cited by agricultural officials throughout the former Soviet Union was the lack of plant-protection agents. Imports of chemical pesticides were down 30 percent from the previous year, and the Government was able to satisfy only one-half of the orders from State and Collective Farms.

Prospects for the 1992 crop year are mixed, but generally point toward an improvement over last year's grain crop. The area seeded to winter grains has increased considerably from the low levels of last year. In the Russian Federation, 19.9 million hectares of winter grains had been sown as of November 2, 1991, up 3.4 million hectares from the previous year. Officials reported that the winter-grain crop in both the Russian Federation and Ukraine experienced lower-than-normal winterkill for the third year in a row. Reports in the Russian press indicate that quantity and quality of seed for spring-planted crops are adequate. Despite familiar alarms in the press concerning aging equipment and shortages of fuel, spare parts, and herbicides, officials in the newly independent states of the Soviet Union are optimistic about the upcoming crop season, and generously estimate 1992 total grain production at 220.0 million tons. While the U.S. agricultural counselor in Moscow agrees that early indicators suggest a rebound in 1992 grain production, he cites persistent shortages of agrochemicals, petroleum, mineral fertilizers, quality seed, and other key farm inputs. He also states that the supply and distribution of these inputs have been adversely affected by the disintegration of the agricultural infrastructure of the former Soviet Union. Contribution to grain production by new private farmers in the newly independent states is likely to be insignificant, due to limited access to necessary means of production.

State and Collective Farms sold a total of about 40.0 million tons of grain to State procurement centers in 1991. Procurements were down considerably from the 67.0 million tons purchased by the State in 1990. Producers became increasingly reluctant to sell grain to the State for rubles, preferring instead to barter their grain for hard-to-obtain goods such as construction materials, or electing to hold on to their grain in the hopes of selling it on the open market.

The combination of inadequate rainfall and high temperatures during the 1991 growing season also was responsible for a decline in the production of sunflowerseed, the number-one oilseed in the former Soviet Union. Sunflower fields in eastern Ukraine, Rostov oblast in the Russian North Caucasus region, and the lower Volga Valley experienced dry, extremely hot weather during the critical flowering stage. Production fell from 6.55 million tons in 1990 to 5.62 million in 1991, including 2.90 million in the Russian Federation and 2.44 in Ukraine. The combined yield of 1.25 tons per hectare was the lowest since 1984, when sukhovei conditions forced yields down. Sunflowerseed yields were highest in Ukraine, where producers gathered 1.53 tons per hectare. Yields in Moldova, where the highest yields are usually achieved, dropped almost 30 percent in 1991, to 1.34 tons per hectare.

In striking contrast to the production of grains and oilseeds, 1991 was a relatively good year for cotton production, with 7.8 million tons of seed cotton harvested. Although a 5-percent reduction in seeded area pulled 1991 production below the previous year's level, 1991 seed-cotton yields of 2.58 tons per hectare almost matched the excellent yields achieved in 1990. As usual, Uzbekistan was the leading cotton producer with 4.6 million tons. Turkmenistan, the second-largest producer, harvested 1.4 million tons, and yields surpassed those of the previous year. Combined lint production is expected to total approximately 2.4 million tons, or 11.0 million 480-pound bales.

Mark Lindeman (202) 690-0143

DAIRY PRODUCTION IN SELECTED COUNTRIES

Revised production forecasts for 18 selected countries, accounting for about three-quarters of world dairy production, indicate prospects for 1992 are slightly less favorable than projected in November 1991. Milk production in the 18 countries is estimated at 332.8 million tons, down from the preliminary forecast of 333.2 million in November and 339.2 million in 1991. The November estimates for milk output in France and Germany have been revised downward, while estimates for the United States, Australia, and New Zealand have been raised.

The 1992 forecast for butter production in the 18 countries has been revised downward to 4.6 million tons. This is 2 percent below both the November projection and the volume produced in 1991. Cheese output is forecast at 9.3 million tons, 1 percent below the November forecast, but marginally above the 1991 production level of 9.2 million. Production of nonfat dry milk is expected to total 2.8 million tons, a 3-percent increase from the November projection, but 2 percent less than was manufactured in 1991.

In the United States, 1992 milk production is forecast at 68.2 million tons, up 1 percent from 1991 and the November forecast. Canadian milk production and cow numbers are expected to decline again in 1992 reflecting another cut in the quota for deliveries of processing milk. Mexico's 1992 milk output is now estimated at 10.7 million tons, unchanged from the November forecast, but 5 percent above 1991. Growth in the general economy is keeping milk demand strong.

Milk output in Germany is forecast at 28.3 million tons, down 4 percent from the November forecast and 2 percent less than in 1991. The decline mainly reflects the problems eastern Germany is experiencing trying to adapt to market conditions and EC quotas. Current assessments indicate that dairy output in eastern Germany will stabilize in 1992 or 1993. French milk production is forecast at 25.8 million tons, down 2 percent from the November forecast, but essentially unchanged from a year ago. Milk output in Italy is forecast at 11.1 million tons, slightly above the November forecast, but down 2 percent from 1990.

In the newly independent states of the former USSR, short feed supplies and a smaller number of milk cows at the beginning of 1992 are expected to result in a 5 to 7 percent decline in milk output. Milk production in Poland is forecast at 14.3 million tons, down from 14.9 million in 1991. Prospects for growth continue to be limited by low prices that make it difficult for Poland's small dairy farms to make a profit.

Japan's milk production is expected to show a marginal increase in 1992, a turnaround from the decline forecast in November. Milk cow numbers remained constant during 1991. In Australia and New Zealand, prospects for milk production in 1992 have improved since November due to favorable rainfall and good pasture growth this season in the major dairy regions in both countries.

The mix of dairy product output in 1992 will continue to be influenced by relative prices which, so far this year, generally have favored cheese production. Cheese output in the 18 selected countries is estimated at 9.3 million tons, 1 percent above 1991, but slightly below the November forecast. The most significant changes, since the November forecasts, occurred in Germany and the newly independent states of the USSR. Estimates for Germany declined by 10 percent, to 760,000 tons. In Germany, the decline in dairy manufacturing in the eastern region was steeper than expected. The estimate for the newly independent states of the former USSR is down 7 percent, to 715,000 tons. The decline in milk production appears to have affected the manufacturing sector more than the fresh milk sector.

Butter production for 1992 in the 18 specified countries is estimated at 4.6 million tons, down from both 1991 and the November forecast. Significant changes from the November forecasts include an upward adjustment in the United States and downward adjustments in the newly independent states of the former USSR and Germany. In the United States, much of the 1992 increase in milk production is expected to be used for butter production. Butter production in Germany and the newly independent states of the former USSR is being hurt by the same factors that are affecting cheese production--i.e. a decline in milk processing due to unfavorable price relationships and an uncompetitive industry structure.

Output of nonfat dry milk in the 18 countries reviewed has been revised to 2.8 million tons, 2 percent below the 1991 level, but 3 percent above the November forecast. Estimates were increased for the United States, Germany, and Australia. The higher estimate for the United States reflects the likely increase in butter output, while increased German and Australian estimates are due to improved prices.

Revised forecasts for casein put 1992 production at 219,000 tons, 12 percent above 1991 and 5 percent above the November forecast. Poland is expected to record the largest year-to-year increase as improved export prospects helped the industry recover.

Arthur Coffing (202) 720-0885

TABLE 17

MILK COW NUMBERS IN SELECTED COUNTRIES 1/

(1,000 Head)

	1988	1989	1990	1991 2/	1992 3/	1992 4/
Canada	1,467	1,449	1,429	1,410	1,390	1,380
Mexico	6,200	6,300	6,410	6,440	6,470	6,470
United States	10,262	10,126	10,127	9,990	9,893	9,835
Denmark	774	764	770	769	765	746
France	5,841	5,574	5,489	5,400	5,350	5,350
Germany	7,071	6,960	6,680	5,800	5,700	5,550
Ireland	1,444	1,387	1,400	1,387	1,370	1,364
Italy	3,020	2,973	2,925	2,800	2,750	2,750
Netherlands	1,946	1,888	1,855	1,819	1,830	1,785
Portugal	402	414	398	403	405	405
Spain	1,882	1,880	1,834	1,586	1,500	1,500
United Kingdom	3,166	3,142	3,220	3,206	3,159	3,149
Poland	4,806	4,994	4,900	4,707	4,500	4,363
Former USSR 5/	42,000	41,809	41,716	41,481	40,500	39,900
Japan	1,046	1,066	1,081	1,081	1,085	1,080
China	2,164	2,222	2,691	2,800	2,900	2,900
Australia 6/	1,697	1,663	1,631	1,618	1,555	1,555
New Zealand 7/	2,280	2,236	2,269	2,300	2,300	2,399
SUBTOTAL	97,468	96,847	96,825	94,997	93,422	92,481
OTHERS	61,342	61,393	64,422	62,953	63,888	63,888
TOTAL	158,810	158,240	161,247	157,950	157,310	156,369

1/ This is the semiannual update of the production series regularly published in the World Agricultural Production and World Dairy Situation circulars.

2/ Preliminary.

3/ Forecast November 1991.

4/ Forecast May 1992.

5/ Former USSR covers the same area previously designated USSR.

6/ Year beginning July 1.

7/ Year beginning June 1.

TABLE 18

COW MILK PRODUCTION IN SELECTED COUNTRIES 1/

(1,000 Metric tons)

	1988	1989	1990	1991 2/	1992 3/	1992 4/
Canada	8,229	7,980	7,975	7,900	7,900	7,850
Mexico	8,830	8,970	9,330	10,200	10,700	10,700
United States	65,840	65,424	67,276	67,370	67,560	68,150
Denmark	4,739	4,747	4,742	4,640	4,640	4,600
France	26,000	26,150	26,400	25,880	26,250	25,800
Germany	32,000	32,400	31,100	28,900	29,400	28,300
Ireland	5,573	5,575	5,595	5,527	5,512	5,467
Italy	10,671	10,828	11,491	11,300	11,000	11,100
Netherlands	11,406	11,321	11,285	11,050	11,250	10,890
Portugal	1,346	1,420	1,519	1,550	1,580	1,580
Spain	5,950	6,000	6,200	6,100	5,950	5,950
United Kingdom	14,880	14,647	14,952	14,710	14,490	14,750
Poland	15,450	16,371	15,801	14,906	14,300	14,300
Former USSR 5/	106,800	108,529	108,384	101,720	95,000	95,000
Japan	7,607	8,059	8,190	8,260	8,250	8,300
China	3,660	3,813	4,157	4,626	4,800	5,000
Australia 6/	6,297	6,465	6,435	6,578	6,474	6,680
New Zealand 7/	7,936	7,406	7,746	7,973	8,119	8,334
SUBTOTAL	343,214	346,105	348,578	339,190	333,175	332,751
OTHERS	85,845	88,763	93,395	90,053	92,003	92,003
TOTAL	429,059	434,868	441,973	429,243	425,178	424,754

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7/ Year beginning June 1.

TABLE 19

BUTTER PRODUCTION IN SELECTED COUNTRIES 1/

(1,000 Metric tons)

	1988	1989	1990	1991 2/	1992 3/	1992 4/
Canada	105	99	100	97	100	100
Mexico	32	33	34	34	35	35
United States	547	588	591	606	560	610
Denmark	94	92	93	71	70	66
France	521	518	527	480	500	500
Germany	700	711	640	554	530	500
Ireland	139	156	159	151	138	144
Italy	71	74	80	80	75	75
Netherlands	214	213	209	198	175	175
Portugal	10	12	15	17	19	19
Spain	27	30	46	38	35	35
United Kingdom	140	130	138	113	125	120
Poland	293	325	300	220	300	220
Former USSR 5/	1,724	1,726	1,738	1,565	1,550	1,500
Japan	68	78	76	76	76	77
Australia 6/	98	96	111	111	111	122
New Zealand 7/	276	246	276	269	267	267
SUBTOTAL	5,059	5,127	5,133	4,680	4,666	4,565
OTHERS	1,509	1,594	1,689	1,713	1,685	1,685
TOTAL	6,568	6,721	6,822	6,393	6,351	6,250

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2/ Preliminary.

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6/ Year beginning July 1.

7/ Year beginning June 1.

TABLE 20

CHEESE PRODUCTION IN SELECTED COUNTRIES 1/

(1,000 Metric tons)

	1988	1989	1990	1991 2/	1992 3/	1992 4/
Canada	252	247	255	260	250	260
Mexico	370	373	384	395	400	400
United States	2,527	2,546	2,749	2,763	2,885	2,900
Denmark	258	275	293	285	288	293
France	1,378	1,485	1,471	1,494	1,520	1,510
Germany	849	885	749	750	840	760
Ireland	75	74	72	73	70	80
Italy	737	760	811	810	780	790
Netherlands	559	568	593	609	600	618
Portugal	44	55	49	49	48	48
Spain	120	123	133	140	150	150
United Kingdom	299	280	316	312	278	280
Poland	133	130	126	106	125	115
Former USSR 5/	894	900	881	793	770	715
Japan	26	27	28	29	30	30
Australia 6/	176	190	175	178	180	180
New Zealand 7/	128	128	122	125	129	129
SUBTOTAL	8,825	9,046	9,207	9,171	9,343	9,258
OTHERS	1,664	1,702	1,703	1,709	1,695	1,695
TOTAL	10,489	10,748	10,910	10,880	11,038	10,953

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2/ Preliminary.

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6/ Year beginning July 1.

7/ Year beginning June 1.

TABLE 21

NONFAT DRY MILK PRODUCTION IN SELECTED COUNTRIES 1/

(1,000 Metric tons)

	1988	1989	1990	1991 2/	1992 3/	1992 4/
Canada	110	93	93	79	91	85
Mexico	5	6	9	9	9	9
United States	444	397	399	398	350	385
Denmark	7	13	41	17	15	13
France	490	492	580	455	500	500
Germany	446	500	509	528	450	480
Ireland	100	140	200	188	160	155
Italy	1	0	0	0	0	0
Netherlands	87	83	70	53	50	57
Portugal	9	10	15	17	19	19
Spain	29	31	46	30	30	25
United Kingdom	136	133	166	132	131	130
Poland	159	174	175	140	150	150
Former USSR 5/	350	300	300	280	260	260
Japan	159	178	179	181	176	183
Australia 6/	120	127	144	156	151	171
New Zealand 7/	198	181	208	171	165	165
SUBTOTAL	2,850	2,858	3,134	2,834	2,707	2,787
OTHERS	385	448	432	378	385	385
TOTAL	3,235	3,306	3,566	3,212	3,092	3,172

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2/ Preliminary.

3/ Forecast November 1991.

4/ Forecast May 1992.

5/ Former USSR covers the same area previously designated USSR.

6/ Year beginning July 1.

7/ Year beginning June 1.

TABLE 22

CASEIN PRODUCTION IN SELECTED COUNTRIES 1/

(1,000 Metric tons)

	1988	1989	1990	1991 2/	1992 3/	1992 4/
Denmark	21	19	13	16	16	18
France	61	47	26	29	25	30
Germany	25	22	16	16	18	18
Ireland	44	32	28	27	28	32
Netherlands	20	20	30	20	18	18
United Kingdom	0	1	2	1	1	1
Poland	24	33	38	20	33	33
Australia 5/	9	7	5	3	3	3
New Zealand 6/	66	56	64	64	66	66
SUBTOTAL	270	237	222	196	208	219
OTHERS	0	0	0	0	0	0
TOTAL	270	237	222	196	208	219

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2/ Preliminary.

3/ Forecast November 1991.

4/ Forecast May 1992.

5/ Year beginning July 1.

6/ Year beginning June 1.

May 1992

Production Estimates and Crop Assessment Division, FAS, USDA

DRIED FRUIT PRODUCTION IN SELECTED COUNTRIES

Dried fruit production in selected countries of the Northern and Southern Hemispheres for 1991/92 is estimated at 850,522 tons (packed weight basis), down 4 percent from the 1990/91 pack. Northern Hemisphere output is estimated at 662,350 tons, down 7 percent from 1990/91 due to smaller dried prune packs in France and Yugoslavia as well as sharply reduced raisin/sultana production in Mexico, Turkey, and the United States. In the Southern Hemisphere, dried fruit production is expected to total 188,172 tons in 1991/92, up from 179,291 last season, primarily because of a 9-percent gain in dried prune production and a 4-percent increase in the raisin/sultana pack.

RAISINS/SULTANAS

Production of raisins/sultanas in selected countries for the 1991/92 season is forecast at 625,662 tons (packed weight basis), 9 percent below the 1990/91 level. Smaller packs in Chile, Mexico, and the United States represent most of the aggregate year-to-year decline.

In the Southern Hemisphere, preliminary forecasts indicate 1991/92 output of raisins/sultanas--harvested early in 1992--will total 163,772 tons, up 4 percent from 1990/91. Australian production is forecast at 97,898 tons, 15 percent larger than the bumper harvest in 1990/91, due to generally favorable weather in all producing regions. However, rain in some producing areas during February did reduce the quality of a small portion of the crop. Argentina's 1991/92 pack is forecast at 7,400 tons, slightly below last season's volume because of inclement weather in San Juan Province. Raisin output in Chile is forecast at 17,000 tons, nearly 50 percent below the 1990/91 pack. The reduction stems from supply problems caused by weather damage to the fresh grape crop and strong demand from the wine industry that substantially lowered the volume of grapes available for drying. The 1991/92 raisin/sultana pack in the Republic of South Africa is expected to reach a record 41,000 tons, a 35-percent increase from 1990/91. This year's hot, dry weather, coupled with adequate supplies of irrigation water, created ideal conditions for growing and drying the grape crop.

DRIED PRUNES

Production of dried prunes in selected countries during the 1991/92 season is forecast at 224,860 tons (packed weight basis), 10 percent above the 1990/91 level. The Northern Hemisphere pack is estimated at 200,460 tons, mainly due to a 22-percent increase in U.S. production that more than offset smaller crops in France and Yugoslavia.

Preliminary forecasts for the Southern Hemisphere indicate production will increase by 9 percent despite some weather problems. The dried prune pack in Argentina is forecast at 7,000 tons, down 7 percent from 1990/91 due to untimely rains and early frosts that significantly reduced the fresh plum crop. Dried prune output in Australia is forecast at only 1,400 tons, 41 percent below the 1990/91 pack. Excessive rains in New South Wales, the major producing state, were responsible for the downturn. Dried prune production in Chile is forecast at 13,500 tons, 31 percent greater than last season's weather-damaged pack, but 2 percent below the record outturn in 1989/90. Frosts and untimely spring rains only marginally reduced the volume of the fresh plum crop, but quality and fruit size are reportedly below average. South Africa's 1991/92 pack is projected at 2,500 tons, up 18 percent from last season. Dried prunes were one of the few commodities to benefit from the dry conditions prevalent throughout much of southern Africa.

TABLE 23

RAISIN/SULTANA PRODUCTION IN SELECTED COUNTRIES (Metric tons – packed weight basis)

	1982/83	1983/84	1984/85	1985/86	1986/87	1987/88	1988/89	1989/90	1990/91	1991/92 1/
NORTHERN HEMISPHERE										
Greece	75,000	103,000	67,000	90,000	69,000	40,000	77,800	83,580	37,000	38,000
Mexico 2/	16,000	9,120	6,934	20,000	21,145	11,250	11,000	7,000	12,500	9,000
Turkey	95,000	100,000	80,000	120,000	110,000	110,000	150,000	138,000	144,000	135,000
United States	246,465	328,980	273,805	284,715	236,320	303,950	315,860	366,665	335,115	279,890
Total	432,465	541,100	427,739	514,715	436,465	465,200	554,660	595,245	528,615	461,890
SOUTHERN HEMISPHERE 3/										
Argentina	8,000	7,000	5,800	5,500	6,500	6,600	7,000	8,000	7,500	7,400
Australia	79,730	81,740	70,327	93,736	63,991	74,029	60,012	59,154	85,478	97,898
Chile	3,300	4,000	6,200	9,000	9,000	16,500	24,500	30,500	33,400	17,000
South Africa	32,898	29,839	28,545	37,685	30,659	27,448	20,639	34,104	30,621	41,474
Total	123,928	122,579	110,872	145,921	110,150	124,577	112,151	131,758	156,999	163,772
TOTAL	556,393	663,679	538,611	660,636	546,615	589,777	666,811	727,003	685,614	625,662

1/ Preliminary.

2/ Estimate as of November 1991.

3/ Harvest generally occurs in the second year indicated.

MAY 1992

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

TABLE 24

DRIED PRUNE PRODUCTION IN SELECTED COUNTRIES (Metric tons – packed weight basis)

	1982/83	1983/84	1984/85	1985/86	1986/87	1987/88	1988/89	1989/90	1990/91	1991/92 1/
<u>NORTHERN HEMISPHERE</u>										
France 2/	35,600	25,184	38,941	25,742	35,978	30,380	41,494	19,949	36,745	25,000
Yugoslavia 2/	31,000	29,107	20,000	18,700	11,870	12,387	12,873	12,148	5,239	4,000
United States	117,735	135,490	138,290	134,310	94,300	218,135	143,835	215,275	140,025	171,460
Total	184,335	189,781	197,231	178,752	142,148	260,902	198,202	247,372	182,009	200,460
<u>SOUTHERN HEMISPHERE 3/</u>										
Argentina	6,000	6,500	8,000	9,000	6,000	11,000	7,500	8,000	7,500	7,000
Australia	3,683	2,703	3,547	3,813	4,472	1,749	3,357	2,556	2,368	1,400
Chile	4,000	4,500	5,500	9,300	8,700	11,000	10,000	13,800	10,300	13,500
South Africa	2,024	2,085	1,652	2,351	2,121	2,752	2,901	3,512	2,124	2,500
Total	15,707	15,788	18,699	24,464	21,293	26,501	23,758	27,868	22,292	24,400
TOTAL	200,042	205,569	215,930	203,216	163,441	287,403	221,960	275,240	204,301	224,860

1/ Preliminary.

2/ Estimate as of November 1991.

3/ Harvest generally occurs in the second year indicated.

MAY 1992

PRODUCTION ESTIMATES AND CROP ASSESSMENT DIVISION, FAS, USDA

PINEAPPLE PRODUCTION IN SELECTED COUNTRIES

Pineapple production in selected countries during 1992 is forecast at 5.11 million tons, 5 percent above the 1991 level. Output in Thailand, the world's largest producer, is forecast to increase 11 percent, to 1.85 million tons. The Philippine crop is expected to decline 1 percent, to 1.17 million tons. Pineapple production levels in Australia, Kenya, Malaysia, and Taiwan are expected to continue trending upward as they have for the past several years, while production in the United States continues its long-term decline.

Thailand's 1992 pineapple crop is estimated at 1.85 million tons, up 11 percent from 1991. Continuing dry conditions in the major pineapple producing areas reduced yields for the crop harvested in mid-April and will probably have the same dampening effect on yields during the August harvest season. However, since Thai pineapple production normally fluctuates from year-to-year based on weather conditions and domestic prices, the 11-percent increase forecast for 1992 can be justified by the following: a recorded first-quarter production gain of 20 percent, compared to the same period last year, resulting from favorable growing conditions in late 1991 and greater use of inputs; a significant expansion in 1992 harvested area spurred by lucrative grower returns for the past 2 years; and, preliminary assessments indicating a larger-than-normal winter crop (harvested November/December 1992).

After increasing 2 percent in 1991, Philippine pineapple production is forecast to decline slightly in 1992. High grower prices in 1990 and early 1991 encouraged area expansion, but continuing dryness throughout Mindanao has stressed plants and lowered the 1992 per hectare yield. The impact of the dry weather has been compounded by higher costs for fertilizers and other production-related chemicals. Production targets for 1992 are expected to be met through the "forcing" of additional plantings to compensate for anticipated yield reductions. This practice will disrupt normal crop cycles and likely reduce plantation output for the next 2 years if planting targets are not increased.

Pineapple production in Cote d'Ivoire declined in 1991 and the downward trend is expected to continue through 1992. Declining grower returns, coupled with higher prices for inputs, continue to push marginal producers out of the industry. The long-term outlook cedes domination of the pineapple sector to large-scale producers with the resources to stabilize the industry and effect improvements in fruit quality and productivity.

Kenya's pineapple production in 1992 is forecast at a record 270,000 tons, up 10 percent from the previous high of 245,000 set in 1991. Harvested area is expected to increase 6 percent, to 7,000 hectares, primarily because of additional expansion on the plantations. Favorable weather aided yields in both 1991 and 1992 as did the industry's shift to a higher-yielding production cycle consisting of one plant crop and a single ratoon crop. Future industry-wide gains will be tempered by a lag in productivity from the smallholder sector which lacks the resources to increase plantings, adopt new cultivation techniques, or improve input usage.

Production for 1992 in the Republic of South Africa is expected to recover to 190,000 tons, up 18 percent from 1991 when drought severely damaged the crop in the Eastern Cape, but well below the 1986-90 average of 250,180 tons. Although drought still plagues many regions of South Africa, pineapple production areas have benefitted from ample rainfall and generally improved agricultural conditions since late 1991. However, the turnaround came too late to provide enough relief to the drought-stressed plants to boost 1992 production to a more normal level.

Pineapple production in Taiwan has expanded steadily since 1983 concurrent with the shift away from a canning-oriented industry to one that primarily supplies fresh fruit to the domestic market. The 1992 pineapple crop is forecast at 248,000 tons, 3 percent above the 1991 level, due to favorable growing conditions, an increase in harvested area, and the continuing incentive provided by rising grower profits.

Malaysia's 1992 pineapple crop is forecast at a record 244,000 tons, a 5-percent increase from last season, primarily because of favorable growing conditions, continued area expansion by smallholders, and higher yields. Growing export opportunities for canned pineapple in the Japanese market have generated optimism throughout the pineapple industry and the Malaysian Government and renewed interest in pineapple cultivation. Construction of a new plantation and cannery in Sarawak is expected to be underway by mid-1992 and the Terengganu State Government has expressed an interest in cultivating 8,000 hectares of pineapple along Malaysia's eastern coast.

Mexico's pineapple crop is forecast at 329,000 tons, slightly below the 1991 level, primarily due to a reduction in harvested area. The outlook will remain bleak as long as growers are financially squeezed between rising production costs and cutbacks in credit and government production subsidies.

Pineapple production in the United States is expected to decline for the fifth consecutive year, to 475,000 tons. The long-term outlook for the industry points to further contraction as more pineapple land is converted to non-agricultural uses.

Arthur Coffing (202) 720-0885

TABLE 25

FRESH PINEAPPLE PRODUCTION IN SELECTED COUNTRIES

(1,000 Metric tons)

	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	May 1992 1/
Australia	125.5	111.3	115.1	124.5	155.0	165.0	168.3	146.0	142.0	151.0	155.0
Cote d'Ivoire	233.4	181.5	227.6	294.8	280.5	269.1	216.4	187.7	194.8	184.0	183.5
Kenya	NA	NA	168.0	167.0	231.3	210.0	190.5	212.3	225.0	245.0	270.0
Malaysia	188.3	183.4	174.5	182.4	174.1	178.5	194.5	216.1	209.8	232.4	243.7
Mexico	440.0	250.0	260.0	325.0	292.5	306.0	247.5	324.0	328.0	333.0	328.5
Philippines	1,009.8	967.0	1,035.7	1,030.0	1,273.2	1,303.4	1,181.2	1,178.8	1,155.8	1,180.0	1,170.0
South Africa	244.1	209.6	184.3	247.6	247.9	267.4	264.8	262.2	208.6	161.1	190.0
Taiwan	144.9	115.2	123.6	149.7	157.9	193.3	228.1	230.7	233.5	241.0	248.0
Thailand	1,439.3	1,465.8	1,472.5	1,768.9	1,635.7	1,510.0	1,690.5	1,732.0	1,512.0	1,660.0	1,850.0
Total Foreign	3,825.2	3,483.7	3,761.3	4,289.9	4,448.1	4,402.7	4,381.9	4,489.9	4,209.5	4,387.5	4,638.7
United States	607.8	655.0	544.3	512.6	586.0	627.8	597.8	526.2	521.6	503.5	475.0
TOTAL	4,433.1	4,138.7	4,305.6	4,802.5	5,034.1	5,030.4	4,979.7	5,016.1	4,731.1	4,891.0	5,113.7

1/ Forecast.

NA = Not available.

MAY 1992

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